2011 User's Guide

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Getting Started

Introduction to Microsoft Dynamics CRM

You can perform and automate many business tasks with Microsoft Dynamics CRM, including:

- Keep and use all your customer information from one place.
- Schedule and track activities, and send e-mail messages.
- Analyze data using charts and dashboards.
- Generate reports.
- Manage marketing lists.
- Track advertising and marketing campaigns.
- Analyze customer responses to your sales and marketing initiatives.
- Keep detailed notes and an activity history for each business record.
- Run Microsoft Dynamics CRM from within Microsoft Office Outlook.

Sales Force Automation

Using Sales Force Automation, you can:

- Qualify leads and manage opportunities.
- Manage contacts and accounts.
- Track quotes, orders, and invoices.
- Manage and track e-mail, phone call, and other communication activities with customers.
- Run direct e-mail campaigns and measure their success.
- Create and access a database of products that your organization sells.

More information:

- *Managing Accounts and Contacts* (on page 265)
- *Completing Sales Transactions* (on page 340)
- Creating the Product Catalog

Marketing Automation

Using Marketing Automation, you can:

- Create targeted marketing lists.
- Plan and run campaigns.
- Track each campaign response and lead generated from campaigns.

More information:

- *Planning Campaigns* (on page 375)
- Managing Campaign Activities and Planning Tasks
- *Creating and Managing Marketing Lists* (on page 387)

Customer Service Management

Using the Customer Service area, you can:

- Track individual cases and manage services.
- Track and share common problems and solutions in a knowledge base.
- Manage customer contracts.

More information:

- Publishing Articles in the Knowledge Base
- *Creating Contracts* (on page 444)
- *Supporting Customer Service with Microsoft Dynamics CRM* (on page 451)

Appointment-Based Service Scheduling

Using Service Scheduling, you can:

- Define the services you offer.
- Identify available resources and equipment for service activities.
- Define work schedules for individual resources, as well as their locations.
- *Navigating the Service Calendar* (on page 427)
- Booking Service Activities in the Service Calendar
- Configuring Service Scheduling
- Scheduling Users and Other Resources

Analyzing Data and Reporting

Microsoft Dynamics CRM has several features to help you analyze data and generate reports:

- Create a chart.
- Create a dashboard.
- Run a default report.
- Create an Advanced Find query to find a filtered set of records and then export the list for analysis.
- Create a custom report using Microsoft SQL Server Reporting Services or other reporting tools.

More information:

- *Understanding Charts* (on page 140)
- *Using dashboards* (on page 147)

- *Running Reports and Analyzing Data* (on page 95)
- *Default Reports* (on page 97)
- *Customizing and Organizing Reports* (on page 95)

Customization and Solutions

By using the customization capabilities of Microsoft Dynamics CRM, you can:

- Create new Microsoft Dynamics CRM forms, entities, and fields without custom programming. The tools to create these are in the application.
- Customize forms and views for enhanced integration with other Web applications, portals, and business systems.
- Apply form validation and add client-side business logic through scripting.

A Microsoft Dynamics CRM solution is a software package made up of one or more components that extends the user interface or functionality of Microsoft Dynamics CRM. A solution component must come with Microsoft Dynamics CRM (native to Microsoft Dynamics CRM).

You can customize a solution component only if you can customize the component by default, or if the solution developer made the component available for customization.

Solution components include custom entities, processes defined in workflows or plugins, form customizations, Web resources, and templates.

More information:

- *Understanding solutions* (on page 499)
- *Understanding entity forms* (on page 560)
- *Customizing Entities* (see "*Understanding Entities*" on page 517)
- *Permissions required for customization* (see "*Permissions required for customization tasks*" on page 490)

Workflow

Beyond the business automation included in Microsoft Dynamics CRM, you can define processes, workflows, and dialogs to automate your organization's business logic and to ensure consistent customer interactions. Then, make your processes available as an on-demand process or, for workflows, an automatic workflow.

More information: Work with processes

Goal Management

Using Goal Management, you can:

- Track goals at every level of your goal hierarchy.
- Create child goals that roll up into parent goals.
- Define rollup fields for your goal metrics that identify the performance that you are tracking.
- View actual and in-progress data when you want it and at scheduled rollup times.

More information:

- *Work with goals* (on page 333)
- *Work with goal metrics* (on page 333)
- *Work with rollup queries* (on page 340)

Microsoft Dynamics CRM for Microsoft Office Outlook

Microsoft Dynamics CRM for Outlook is add-on program for Outlook that provides Microsoft Dynamics CRM functionality within Outlook. The information is kept in synchronization automatically between Outlook and Microsoft Dynamics CRM. When you run Microsoft Dynamics CRM for Outlook, you can work either in online or offline mode.

More information:

- *Doing CRM Work in Outlook* (on page 459)
- *Working Offline* (on page 486)
- *Synchronizing Information* (on page 484)

Use Keyboard Shortcuts

The shortcut keys described in this section refer to the U.S. keyboard layout. Keys on other layouts might not correspond exactly to the keys on a U.S. keyboard.

General keyboard shortcuts

Action	**Press**
Copy text	Ctrl+C
Paste text	Ctrl+V
Undo previous text change	Ctrl+Z
Save a record	Ctrl+S
Close a record	Esc
Cut text	Ctrl+X
Delete text	Delete
Delete selected text immediately without putting it on the Clipboard	Shift+Delete
Move to the first tab on the ribbon	Ctrl+[
Move to the last tab on the ribbon	Ctrl+]
Move the insertion point to the start of the next word	Ctrl+Right Arrow
Move the insertion point to the start of the previous word	Ctrl+Left Arrow
Select all text in the current field	Ctrl+A
Display the System menu for the active window	Alt+Spacebar

Action	**Press**
Display the shortcut menu for the selected item	Shift+F10
Cancel the current task or command, or close a selected list or dialog box	Esc
Move up through a list of records	Up Arrow
Move down through a list of records	Down Arrow
Open the selected record	Enter
Select all records on the current page	Ctrl+A
Jump to the sitemap	Ctrl+Shift+3
Open the recently viewed pages and view menu	Ctrl+Shift+7
Select multiple rows in a list sequentially	Shift+Up Arrow or Shift+Down Arrow
Select multiple rows in a list non-sequentially	Tab to the check box and Spacebar
Publish Form Editor customization	Ctrl+Enter

Dialog box keyboard shortcuts

To	**Press**
Move to the next option or option group	Tab
Move to the previous option or option group	Shift+Tab
Complete the command for the active option or button	Enter
Move between options in an open list, or between options in a group of options	Arrow keys
Cancel a command, or close a selected list or dialog box	Esc

Form keyboard shortcuts

Action	**Press**
Save	Ctrl+S or Shift+F12
Save and close	Alt+S
Cancel edits and close (Close)	Esc
Open search	Spacebar or Enter
Delete text from search field	Backspace

Action	**Press**
Delete the record	Ctrl+D
Save and then open a new form (Save and New)	Ctrl+Shift+S
Move forward through the form's fields	Tab
Move backward through the form's fields	Shift+Tab
Open the lookup menu with the most recently used items in alphabetical order	Alt+Down Arrow
Open the list menu	Ctrl+Shift+2
Navigate to the next item on the list	Ctrl+>
Navigate to the previous item on the list	Ctrl+<

Accessibility keyboard shortcuts

In a computer running on Microsoft Windows, you can set system accessibility options to change the way you work. For example, you can use Windows Sticky Keys if you have difficulty holding down two or more keys at a time, such as Ctrl+P. Sticky Keys enable you to press the Ctrl key and have it remain active until you press the P.

To	**Press**
Switch Sticky Keys on and off	Shift five times
Switch Filter Keys on and off	Right Shift for eight seconds
Switch Toggle Keys on and off	Num Lock for five seconds
Switch High Contrast on and off	Left Alt+Left Shift+Print Screen
Switch Mouse Keys on and off	Left Alt+Left Shift+Num Lock

Accessibility keyboard shortcuts

In a computer running on Microsoft Windows, you can set system accessibility options to change the way you work. For example, you can use Windows Sticky Keys if you have difficulty holding down two or more keys at a time, such as Ctrl+P. Sticky Keys enable you to press the Ctrl key and have it remain active until you press the P.

To	**Press**
Switch Sticky Keys on and off	Shift five times
Switch Filter Keys on and off	Right Shift for eight seconds
Switch Toggle Keys on and off	Num Lock for five seconds

To	Press
Switch High Contrast on and off	Left Alt+Left Shift+Print Screen
Switch Mouse Keys on and off	Left Alt+Left Shift+Num Lock

Dialog box keyboard shortcuts

To	Press
Move to the next option or option group	Tab
Move to the previous option or option group	Shift+Tab
Complete the command for the active option or button	Enter
Move between options in an open list, or between options in a group of options	Arrow keys
Cancel a command, or close a selected list or dialog box	Esc

Form keyboard shortcuts

Action	Press
Save	Ctrl+S or Shift+F12
Save and close	Alt+S
Cancel edits and close (Close)	Esc
Open search	Spacebar or Enter
Delete text from search field	Backspace
Delete the record	Ctrl+D
Save and then open a new form (Save and New)	Ctrl+Shift+S
Move forward through the form's fields	Tab
Move backward through the form's fields	Shift+Tab
Open the lookup menu with the most recently used items in alphabetical order	Alt+Down Arrow
Open the list menu	Ctrl+Shift+2
Navigate to the next item on the list	Ctrl+>

Action	**Press**
Navigate to the previous item on the list	Ctrl+<

General keyboard shortcuts

Action	**Press**
Copy text	Ctrl+C
Paste text	Ctrl+V
Undo previous text change	Ctrl+Z
Save a record	Ctrl+S
Close a record	Esc
Cut text	Ctrl+X
Delete text	Delete
Delete selected text immediately without putting it on the Clipboard	Shift+Delete
Move to the first tab on the ribbon	Ctrl+[
Move to the last tab on the ribbon	Ctrl+]
Move the insertion point to the start of the next word	Ctrl+Right Arrow
Move the insertion point to the start of the previous word	Ctrl+Left Arrow
Select all text in the current field	Ctrl+A
Display the System menu for the active window	Alt+Spacebar
Display the shortcut menu for the selected item	Shift+F10
Cancel the current task or command, or close a selected list or dialog box	Esc
Move up through a list of records	Up Arrow
Move down through a list of records	Down Arrow
Open the selected record	Enter
Select all records on the current page	Ctrl+A
Jump to the sitemap	Ctrl+Shift+3
Open the recently viewed pages and view menu	Ctrl+Shift+7
Select multiple rows in a list sequentially	Shift+Up Arrow or Shift+Down Arrow
Select multiple rows in a list non-sequentially	Tab to the check box and Spacebar

Action	Press
Publish Form Editor customization	Ctrl+Enter

Find Things

There are several ways to locate a specific record when you are working with a list of records, or when you are filling out a form. With Advanced Find, you can also save your search as a saved view to use again later.

Find records in a list

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

- Use one of the following methods to find records in a list:

  Filter a list

Select a view from the **View** drop-down list at the top of any list of records. Some lists, such as **Activities** and **Closed Activities**, provide additional choices to help filter a list.

The **View** list includes two types of views: System Views and My Views.

Search for a text string

In the **Search** box, type a few letters to narrow your search, and then click the **Lookup** button .

Use an asterisk (*) as a wildcard if the text you're looking for is not at the beginning of a field. For example, to find all records that contain the word "advanced" in the searched columns, enter *advanced.

Important
The search is not related to the view currently selected in the **View** menu. Only active records are returned.

Tip

For each record type, which fields are searched can be customized. By default, the following fields are searched:

- Account: Account Name, Account Number, E-mail
- Activity and individual activity types including Appointment, E-mail, Letter, Fax, and Phone Call: Subject
- Campaign: Campaign Code, Name
- Case: Title, Case Number
- Contact: Full Name, First Name, Middle Name, Last Name, E-mail, Case Number
- Contract: Contract Name

- Lead: Company Name, First Name, Last Name, Name, Topic
- Marketing List: Name
- Opportunity: Topic
- Quote, Order, Invoice: Name
- Product: Product Name, ID
- Sales Literature: Title

More information: Work with Entities.

Sort a list

- To sort a list of records, click a column heading. To reverse the sort order, click the column heading again.

  An arrow icon in the column heading shows that the list is sorted: the **Ascending Sort** icon indicates ascending, and the **Descending Sort** icon indicates descending.

- To sort by an additional column, press SHIFT while you click the additional column heading.

You cannot sort by columns that display data from a related record type.

Use Advanced Find to filter the list

1. To start an Advanced Find search:

   In the **View** box, select the view that is closest to what you want, and then on the Standard toolbar, click **Advanced Find**.

   - OR -

   On the Actions toolbar, click **Advanced Find**.

2. Specify criteria for your search and the columns to display.

   More information: Work with Advanced Find

   Create your own view

3. To start an Advanced Find search:

   In the **View** box, select the view that is closest to what you want, and then on the Standard toolbar, click **Advanced Find**.

   - OR -

   On the Actions toolbar, click **Advanced Find**.

4. Specify criteria for your search and the columns to display.

   More information: Work with Advanced Find

5. Click **Save As**.

   - In the **Query Properties** dialog box, in the **Name** field, type a name for the search.
   - In the **Description** box, type a brief description, and then click **OK**.

This saves the search as a view. The new view appears on the **Saved Views** tab of the Advanced Find form. This new view is available also from the list page for the record type in the **View** box, in the **My Views** section.

Go to the next page of records

If there is more than one page of records available to view in the list of records, use the **Page** arrows at the bottom of the list to view the additional pages.

Use the alphabetical index

For lists that include an Index at the bottom of the list:

- To view records with the information in the sorted column that begin with a specific letter, click the letter.
- To view records with the information in the sorted column that begin with 0-9, click **#**.
- To view all records, click **All**.

Tips

- To make sure a list of records is current, at the top of the list, click the **Refresh** button, or right-click any record and then click **Refresh list**.
- To preview a record, click the **Preview** button next to the record. To close the preview, click the **Close Preview** button
- To see the exact criteria used for any saved view and most system views, select the view, on the Standard toolbar click **Advanced Find**, and then click **Show Details**.
- It is not possible to find or retrieve deleted records.
- In any list, select multiple records:
    - Select several records by pressing the CTRL key while you click each record.
    - Select a sequence of records by clicking the first record that you want, and then press the SHIFT key while you select the last record that you want.
    - Select all records on the page by selecting the **Select/clear all records on this page** check box at the top of the list.

By default, the Microsoft Dynamics CRM Web application displays 50 records per page. You can increase this up to a maximum of 250 records per page to increase the number of records you can select at one time. To increase the number of records displayed per page:

1. On the **File** menu, click **Options**.
2. On the **General** tab, in the **Records Per Page** list, select the number of records to display per page.
3. Click **OK**.

This changes the number of items that is displayed for all lists, which may slow response time when you switch record types. Therefore, you might want to set it back to a smaller number when you are done with this bulk action.

Related Topics

Find Things....9
Edit Multiple Records....40
Requesting User Interface Changes....220

Find records while filling out a form

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

1. When you fill out a form and need to select a record in a field, you can use the **Lookup** button , or in some forms, you also can use the Form Assistant pane.

   Use the Lookup button

2. Click the **Lookup** button .
3. In the **Look for** box, if needed, select a record type, enter some letters to search for, and then click the **Find** button .
4. Select the record, click the **Add Selected Records** button , and then click **OK**.
5. In the **Advanced Find** page, click **Find**.

   - OR -

   Use the Form Assistant pane:

   - To show or hide the Form Assistant pane, in the title bar of the pane, click the **Expand** button or **Collapse** button .
   - To collapse or expand an individual section, in the title bar of the section, click the **Collapse** button or the **Expand** button .
   - To select a record:
     1. Put the insertion point in the text box for which you want to search for a record.

        If a suggestion is available, the Form Assistant pane filters and displays the appropriate records.
     2. In the Form Assistant pane, click a record.

        The appropriate data fills the text box.
   - To create follow-up activities related to the open record:
     1. From an open record, on the Actions toolbar, click **Follow Up** .

The Form Assistant pane displays a partially completed activity.

2. Select the activity type.

   You cannot create a follow up task activity for an e-mail activity created with a quick campaign. Select a phone call, letter, fax, e-mail or appointment activity.

3. Complete the required fields.
4. Click **Save** or **Save and Open**.

Related Topics

Find Things 9

Create, edit, or save an Advanced Find search

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

1. To create a new search, in the **Data** area, click **Advanced Find**.

   Tip
   Advanced Find starts with criteria based on where you are in Microsoft Dynamics CRM. If you click **Advanced Find** from a view, Microsoft Dynamics CRM loads the criteria for that view.

   - OR -

   To edit a saved search, in the **Data** area, click **Advanced Find**. Then, click the **Saved Views** tab, and double-click the saved view.

2. Specify the search criteria.

   - If **Show Details** is available on the toolbar, click it.

   Specify what to search for

   a. In the **Look for** list, select the type of record you want to search for, such as **Accounts**, **Leads**, or **Users**.

   b. Click **Select** to select criteria for the search, including the field to search on (for example, **Account Name** or **City**), the query relational operator, and the values to locate (for example, "Seattle" or "E-mail").

      You can select fields from the currrent record type, or from related records.

      - For some values, you can click the **Lookup** button to open the **Select Values** dialog box and select the value you want.

   c. At the bottom of the **Select** list, the **Related** section shows related record types. When you select a related record type, a new **Select** link appears to select fields from this related record type.

Clear, delete, or group search criteria clauses

- Clear all search criteria to start over.

  a. Click **Clear** to remove all criteria.

d. In the confirmation message, click **OK**.

- Delete a row of search criteria.

  a. Click the **Options menu** button next to a search criteria row, and then click **Delete**.

  b. In the confirmation message, click **OK**.

- Group criteria.

  a. Click the **Options menu** button next to a search criteria row, and then click **Select Row**.

  To group search criteria, you must select two or more rows for the same record type. For example, **Sales Stage** and **Est. Revenue** are both field values in the **Opportunity** record type and two rows that specify search criteria for these fields can be grouped. However, rows with field values from **Account** and **Opportunity** record types cannot be grouped.

  b. On the Filter toolbar, select **Group AND** or **Group OR**.

e. Repeat steps a and b to create additional criteria groups.

- Select and deselect grouped criteria.

  Click the **Options menu** button next to a search criteria row that has been selected, and then click **Deselect Row**. You can unselect rows from a group or individually.

  Click the **Options menu** button next to the group, and then click **Select Group** to select a group, or click **Deselect Group** to unselect a group that has been previously selected.

- Add a search criteria clause to a criteria group.

  i. Click the **Options menu** button next to the group, and then click **Add Clause**.

  Add search criteria to the new clause.

- Ungroup rows of criteria that you have grouped together using **Group AND** or **Group OR**.

  i. Click the **Options menu** button next to the group you want to ungroup, and then click **Ungroup**.

  Repeat this step to ungroup additional search criteria groups.

- Change a **Group AND** group to a **Group OR** group, or a **Group OR** group to a **Group AND** group.

  i. Click the **Options menu** button next to the group, and then click **Change to OR** or **Change to AND**.

  Repeat this step to change additional search criteria groups.

- Hide or delete a row in Simple view:

  i. To hide a row, click the **Options menu** button next to a search criteria row, and then click **Hide in Simple Mode**.

  To make a hidden row visible, click **Show in Simple Mode**

3. Specify the columns to include in the search results.
   a. Click **Edit Columns**, and then click **Add Columns**.
   b. Select the record type that includes the columns you want to add.
   c. Select the check box next to the columns you want to add. If a column isn't listed, contact your system administrator.
   d. Click **OK**.
   e. The following options are also available:
   f. To adjust the width of a column, click the column, click **Change Properties**, select a width, and then click **OK**.
   g. To reorder columns, select a column, and use the arrow keys to move it to the left or right.
   h. To remove a column, select it, and then click **Remove**.
   i. Click **OK**.
4. Specify the sort order.
   - Click **Edit Columns**, click **Configure Sorting**, and specify the column to sort on, and the sort order.

   Tip: Each view is sorted by only one column. However, after you click Find, you can sort by additional columns. To sort a search results list by an additional column, press SHIFT while you click the additional column header.

   You can only sort on columns from the primary record record type.
5. Save the search as a saved view.
   a. If you're saving an existing saved view, click **Save**. If you are saving a new view or want to change the name of the view because you changed the criteria, click **Save As**.
   b. In the **Query Properties** dialog box, in the **Name** field, type a name for the search.
   - In the **Description** box, type a brief description, and then click **OK**.

   This saves the search as a view. The new view appears on the **Saved Views** tab of the Advanced Find form. This new view is available also from the list page for the record type in the **View** box, in the **My Views** section.
6. Click **Find**.

   Tips
   - When you specify search criteria to find activity records, you can either search through all types of activities or select one type of activity to search, such as Task or Appointment.
   - The columns that are displayed by default are controlled by the Advanced Find View for the record type. More information: Work with Entities.
   - If you need to search based on the names of people who participated in an activity, in the Advanced Find criteria, you must search fields in the related activity party. You can search based on the person's name (**Party** field), or by their role in the activity, such as sender or recipient (**Participation Type** field).

   For example, to find e-mail messages sent to a specific contact:

a. In the Activities list, in the **Type** box, select **E-mail**.

b. Click **Advanced Find**, and then click **Show Details**.

c. Click **Select**, and then in the **Related** section, select **Activity Parties (Activity)**.

d. Under **Activity Parties (Activity)**, click **Select**.

e. In the **Fields** section, click **Participation Type**, click **Enter Value**, and then click the **Select or change the values for this field** button .

f. In the **Available Values** list, select **To Recipient**, click the **Add Selected Records** button , and then click **OK**.

g. Under **Activity Parties (Activity)**, click **Select**.

h. In the **Fields** section, click **Party**.

i. Click the **Equals Current User** operator, and change it to **Equals**.

j. Click **Enter Value**, and then click the **Lookup** button .

k. In the **Look for** box, select **Contact**, enter some letters to search for, and then click **Start search**.

l. Select the contact, click the **Add Selected Records** button , and then click **OK**.

m. In the **Advanced Find** page, click **Find**.

Note

You cannot use Advanced Find to find records related to quick campaigns.

Related Topics

Find Things....9
Export Data to Excel....61
Work with Marketing Lists....389

Work with saved views

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

You can run, share, assign, delete, or deactivate a saved view that you own. If another user has shared a saved view with you, what you can do will depend on the specific privileges that they have given to you: Share, Assign, Delete, or Write.

Run a saved view

On any list page in the **View** box, in the **My Views** section, select a saved view.

If there is not a **My Views** section, there are no saved views for this record type.

- OR -

On the Standard toolbar, click **Advanced Find**, and then click the **Saved Views** tab. Double-click a saved view, and then click **Find**.

Share a saved view

1. On the Standard toolbar, click **Advanced Find**, and then click the **Saved Views** tab.
2. Select the view. On the Actions toolbar, click **Actions**, and then click **Sharing**.
3. In the sharing dialog box, under **Common Tasks**, click **Add User/Team**.
4. In the **Look Up Records** dialog box, in the **Look for** list, select the type of record you want to find.
5. In the **Search** box, type the first few letters of the name of the record to narrow your search, and then click the **Find** button .
6. In the list of available records, click a user or team to select it, and then click the **Add Selected Records** button to add the user or team to the **Selected records** list.
7. Click **OK**.
8. In the sharing dialog box, select the type of share access that you want. The available permissions are: Read, Write, Delete, Append, Assign, or Share.
9. Click **OK**.

   The saved view will show up in the **My Views** section of your coworker's **View** list.

Tips

- To cancel any changes that you have made and retain the previous permissions settings, click **Reset**.
- To select or clear all permissions on a selected item, click **Toggle All Permissions of the Selected Items**.

Assign a saved view

1. On the Standard toolbar, click **Advanced Find**, and then click the **Saved Views** tab.
2. Select the view, and then on the Actions toolbar, click the **Assign** button .
3. In the **Assign** dialog box, click:

   - **Assign to me**

     Use this option to assign the record to yourself.

     - OR -

   - **Assign to another user**

     Click the **Lookup** button , type a part of the user's name, click the **Find** button , double-click the user's name, and then to close **Look Up Records** dialog box, click **OK**.
4. Click **OK**.

Deactivate a saved view

1. On the Standard toolbar, click **Advanced Find**, and then click the **Saved Views** tab.
2. Select the view, and then on the **Actions** menu, click **Deactivate**.

Delete a saved view

1. On the Standard toolbar, click **Advanced Find**, and then click the **Saved Views** tab.
2. Select the view, and then on the Actions toolbar, click the **Delete** button .

E-mail or copy a link to a saved view

Send a shortcut in an e-mail

a. On the Actions toolbar, click **E-mail a Link**, and then click **Of Current View**.

b. Complete the e-mail form and send.

Copy a shortcut

a. On the Actions toolbar, click **Copy a Link**, and then click **Of Current View**.

b. Paste the shortcut into any application that supports copy and paste. For example, in Microsoft Office Word, press CTRL+V. More information: *Send or Copy a Shortcut* (on page 52)

Tips

- To make sure a list of records is current, at the top of the list, click the **Refresh** button , or right-click any record and then click **Refresh list**.
- To preview a record, click the **Preview** button next to the record. To close the preview, click the **Close Preview** button .
- To see the exact criteria used for any saved view and most system views, select the view, on the Standard toolbar click **Advanced Find**, and then click **Show Details**.
- It is not possible to find or retrieve deleted records.
- In any list, select multiple records:
  - Select several records by pressing the CTRL key while you click each record.
  - Select a sequence of records by clicking the first record that you want, and then press the SHIFT key while you select the last record that you want.
  - Select all records on the page by selecting the **Select/clear all records on this page** check box at the top of the list.

By default, the Microsoft Dynamics CRM Web application displays 50 records per page. You can increase this up to a maximum of 250 records per page to increase the number of records you can select at one time. To increase the number of records displayed per page:

1. On the **File** menu, click **Options**.
2. On the **General** tab, in the **Records Per Page** list, select the number of records to display per page.
3. Click **OK**.

This changes the number of items that is displayed for all lists, which may slow response time when you switch record types. Therefore, you might want to set it back to a smaller number when you are done with this bulk action.

Delete Things

Caution

Once you delete a record, it cannot be retrieved.

Typically you should only delete records that you entered by mistake. For some record types, you can deactivate or close the record instead. Not all record types can be deleted. For details, select **Special cases**.

Delete records

Can I do this task?

If the **Delete** button is not visible on the toolbar, the security role assigned to your account does not have permission to delete this type of record. To check your permissions for a specific record, open the record, click the **File menu** button , and then click **Properties**.

If you are deleting a record that has child records, you can delete it only if you also have permission to delete any child records.

More information about specific permissions and performing this task while offline: Common Task Permissions

1. In any list of records, select the record that you want to delete.

   - OR -

   In any list, select multiple records:

   - Select several records by pressing the CTRL key while you click each record.
   - Select a sequence of records by clicking the first record that you want, and then press the SHIFT key while you select the last record that you want.
   - Select all records on the page by selecting the **Select/clear all records on this page** check box at the top of the list.

   Tip

   By default, the Microsoft Dynamics CRM Web application displays 50 records per page. You can increase this up to a maximum of 250 records per page to increase the number of records you can select at one time. To increase the number of records displayed per page:

   1. On the **File** menu, click **Options**.
   2. On the **General** tab, in the **Records Per Page** list, select the number of records to display per page.
   3. Click **OK**.

This changes the number of items that is displayed for all lists, which may slow response time when you switch record types. Therefore, you might want to set it back to a smaller number when you are done with this bulk action.

2. On the Actions toolbar, click the **Delete** button .
3. If you are deleting accounts or contacts, you have the option to deactivate a record instead of deleting it. In the **Delete Confirmation** dialog box:
   - To delete the record, click **Delete**.
   - To deactivate the record, click **Deactivate**.

   For other record types, in the **Confirm Deletion** dialog box, click **OK**.

Notes

- When you delete a record, all its relationships to other records are also deleted.
- If a record has child records, and you have permission to delete the child records, deleting a record also deletes the child records.

Related Topics

Edit Multiple Records....40
Delete Things....19
Add a Note or Attach a File....31
Check Your Permissions for a Record....50

Special Cases

Record type	Notes	More information
Accounts	Can also be deactivated.	*Work with Accounts* (on page 271)
Activities in Queues	When you delete an e-mail message in a queue, it is removed from the queue, but is not deleted as an active activity. To delete it, you must delete it from the Activities list. When you delete other activity types from a queue, the activity record is deleted both from the queue and from Microsoft Dynamics CRM.	Work with Queues
Articles	Articles must be unpublished from the Articles library before being deleted.	*Create and Publish Articles* (on page 453)

Record type	Notes	More information
Cases	Can also be canceled.	*Work with Campaigns and Campaign Templates* (on page 375)
Contacts	Can also be deactivated.	*Work with Contacts* (on page 276)
Leads	Can also be disqualified.	*Work with Leads* (on page 299)
Marketing Lists	Can also be deactivated.	*Work with Marketing Lists* (on page 389)
Opportunities	Can also be closed.	*Work with Opportunities* (on page 310)
Orders	Can also be canceled.	*Work with Orders* (on page 352)
Price Lists	Can also be deactivated.	Work with Price Lists
Quick Campaigns	Deleting a quick campaign record deletes all of the activities created by the quick campaign, even if those activities were not yet complete.	*Work with Quick Campaigns* (on page 382)

Related Topics

Delete Things 19

Remove an attached file

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

1. Open the record that you want.
2. For most record types, click **Notes and Activities**:
   - On the E-mail form, click **Attachments**.
   - On the Service Activity form, click **Service Activity** .
   - On the Case form, click **Notes and Article**.
3. Double-click the status row of the note that contains the attachment that you want to remove.

4. Remove the attached file.

   To keep the note, but remove the attachment:

   - In the **Note** form, in the **File Attachment** area, click **Remove**, click **OK**, and then click **OK** again.

   - OR -

   To remove the note and the attachment:

   - On the **Actions** menu, click **Delete Note**, and then click **OK**.

5. Click **Save** or **Save and Close**.

   Note
   You cannot update an attached file. Instead, save the file on your computer and edit the file, delete the attachment, and then attach the edited file.

Related Topics

Add a Note or Attach a File 31
Manage Activities 23
Delete Things 19

Delete imported records

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

1. In the Navigation Pane, click **Workplace**, and then under **My Work**, click **Imports**.
2. Select the record that you want to delete, followed by one of the following actions:

Tasks	**Required Steps**
Delete the import job that was created for the source file uploaded during an import	In the **Records** group, click **Delete**, and then click **Delete Import Source File**. In the **Confirm Deletion** dialog box, click **OK**.

Delete records that were imported to a record type during an import	In the **Records** group, click **Delete**, and then click **All Records Imported to This Entity During This Import**. In the **Delete Imported Records** dialog box, specify whether you want to delete the import job history, and then click **OK**. **Caution** If your .zip file contains two .csv files, Accounts1.csv and Accounts2.csv, then Microsoft Dynamics CRM makes one import of data from these files to only the **Accounts** record type. While deleting imported records, if you select Accounts1.csv from the Imports list and choose **All Records Imported to This Entity During This Import**, then Microsoft Dynamics CRM deletes all the imported records from Accounts1.csv and Accounts2.csv because of the import to one record type. If the .zip file had a file with records for a different record type, then Microsoft Dynamics CRM only deletes the records for the one record type.
Delete all records that were imported from a .zip file during an import	In the **Records** group, click **Delete**, and then click **All Imported Records from the .zip File**. In the **Delete Imported Records** dialog box, specify whether you want to delete the import job history, and then click **OK**.

Related Topics

Delete Things 19

Print Things

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

1. In the list of records, open the record that you want.
2. On the **File** tab, click **Print Preview**.
3. In the **Preview** form, click **Print**.
4. In the **Print** dialog box, select the print options you want, and then click **Print**.
5. On the Standard toolbar of the **Preview** form, click **Close**.

Note
To print a note, open the record, click the **Notes and Activities** tab, right-click the note that you want, and then click **Print**.

Related Topics

Manage Activities 23
Add a Note or Attach a File 31
Run a Report 132

Print a list of records

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

1. On the **File** tab, click **Print Preview**.
2. If the records in the list extend beyond the current view, you will see the **Print List** dialog box.

   To print a list that is limited to the items listed on the current page, click **All records on current page**, and then click **OK**.

   - OR -

   To print a list of all items that are on all pages for that view, click **All records on all pages**, and then click **OK**.
3. In the **Preview** form, click **Print**.
4. In the **Print** dialog box, select the print options you want, and then click **Print**.
5. On the Standard toolbar of the **Preview** form, click **Close**.

Tips

By default, the Microsoft Dynamics CRM Web application displays 50 records per page. You can increase this up to a maximum of 250 records per page to increase the number of records you can select at one time. To increase the number of records displayed per page:

1. On the **File** menu, click **Options**.
2. On the **General** tab, in the **Records Per Page** list, select the number of records to display per page.
3. Click **OK**. This changes the number of items that is displayed for all lists, which may slow response time when you switch record types. Therefore, you might want to set it back to a smaller number when you are done with this bulk action.

- If you need to print other columns than the ones in the list, use Advanced Find to create a new view that includes all the columns you need. More information: Work with Advanced Find
- If you want to format the list before printing it, export the list to Microsoft Office Excel, and format it there. More information: *Export Data to Excel* (on page 61)
- When you print a list, a title describing the list is not included. If you need a title on your printout, export the list to Microsoft Office Excel, add a title, and then print the worksheet.

Related Topics

Export Data to Excel 61
Find Things 9
Run a Report 132

Print the details of an activity from a calendar

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

You can print the details of an appointment or service activity from the Workplace calendar or the Service calendar.

1. Locate and open the appointment or service activity you want to print.
2. On the **File** tab, click **Print Preview**.
3. In the **Preview** dialog box, click **Print**.
4. In the **Print** dialog box, set the printing options you want, and then click **Print**.
5. On the Standard toolbar, click **Close**.

Note
To print the entire calendar as you see it in the window, click **Print** in Microsoft Internet Explorer.

Related Topics

Work with the Workplace Calendar 440
Print Things 19

Run a Report

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Report Permissions

1. Find and open a report:

   From the Reports area

   a. In the **Workplace**, under **My Work**, click **Reports**.

b. To narrow the list, enter the first few letters of the report name, or use the asterisk (*) wildcard in the **Search** box and then click the **Find** button . You can also select a view.

c. In the reports list, double-click the report that you want to run.

d. If the report has a default filter, the default filter will be displayed. Follow step 2 to change the filter.

Tip: To run a report without seeing the default filter, select the report, and then on the Actions toolbar, click **Actions**, and then click **Run Report**.

From a list of records, including the results of an Advanced Find search

Only reports that relate to the current record type will be available.

You can run some reports on all records in the list, up to ten selected records, or without limiting the records as if you were running the report from the Reports area.

- To run a report on all records on the list:

  a. On the Actions toolbar, click **Reports** .

e. Under **Run on Selected Records**, click the name of the report.

f. In the **Select Records** dialog box, click **All records on all pages in the current view**, and then click **Run Report**.

- To run a report on up to ten selected records from the list:

  a. Select the records to include. Select several records by pressing the CTRL key while you click each record.

g. On the Actions toolbar, click **Reports**.

h. Under **Run on Selected Records**, click the name of the report.

i. In the **Select Records** dialog box, click **The selected records**, and then click **Run Report**.

- To run a report without limiting records to items on the list:

  a. On the Actions toolbar, click **Reports**.

j. If the report is listed under **Run on All Records**, select the report.

  - OR -

  Under **Run on Selected Records**, click the name of the report. In the **Select Records** dialog box, click **All applicable records**, and then click **Run Report**.

  - OR -

  If the report you want to run is not listed, you must go to the Reports area to run the report.

From a record

Only reports that relate to the current record type will be available.

- To run a report including data from just one record:

  a. On the second tab, in the **Data** group, click **Run Report**.

k. Under **Run on Current Record**, click the name of the report.

From Microsoft Dynamics CRM for Outlook

All reports can be run when you are online.

To run a report while you are offline, you must first create a local data group that includes the report, as well as a local data group that includes any data that should be included in the report.

To create a local data group that contains reports, on the **CRM** menu, click **Modify Local Data Groups**, click **New**, select the the **Report** record type, and then define the criteria for which reports to include. More information: Work with Data to Take Offline

- To run reports from the Reports area, in the Outlook Navigation Pane, under **Microsoft Dynamics CRM**, click **Workplace**, click **My Work**, click **Reports**, and then select a report to run.
- To select a report from a record or list, follow the procedures above. These steps work the same way in Microsoft Dynamics CRM for Outlook.

From a report you saved locally

- If you have saved a report on your computer or shared file system that reads dynamic data from Microsoft Dynamics CRM, to open it, browse to the folder that contains your saved report, and double-click the file.

2. If the report offers filter criteria, if needed, modify the filter criteria and then click Run Report.

   The list of existing report filtering criteria is grouped by record types that you can use in the filter, such as **Accounts** or **Contacts**. To edit a parameter in simple mode, click the underlined value and enter a new value.

   - OR -

   To edit the filter criteria in detailed mode:

   a. Click **Edit Filter**.

   b. To add a criteria row:

      1. Click **Select**, and specify the field to filter on.
      2. Click the query relational operator, and select an operator.
      3. Click **Enter Value**, and enter a value to filter on. For some values, you can click the **Select or change the values for this field** button to open the **Select Values** dialog box and select the value you want.

   c. To group criteria, you must select two or more rows for the same record type. For example, **Sales Stage** and **Est. Revenue** are both field values in the **Opportunity** record type and two rows that specify filter criteria for these fields can be grouped. However, rows with field values from different record types, such as **Account** and **Opportunity** record types, cannot be grouped.

      1. For each row you want to group, in detailed mode, click the **Options menu** button for that row, and then click **Select Row**.
      2. On the Filter toolbar, select **Group AND** or **Group OR**.
      3. To remove a row from a group, click the **Options menu** button for that row, and then click **Delete**.
      4. To select a group, click the **Options menu** button for that group, and then click **Select Group**.

5. To add a criteria clause to a group, click the **Options menu** button for that group, click **Add Clause**, and then select the field, query relational operator, and value.
6. To unselect a group that has been previously selected, click the **Options menu** button for that group, and then click **Deselect Group**.
7. To ungroup a group, click the **Options menu** button for that group, and then click **Ungroup**.
8. To change a **Group AND** group to a **Group OR** group, or a **Group OR** group to a **Group AND** group, click the **Options menu** button for that group, and then click **Change to OR** or **Change to AND**.

Tips

- To clear all criteria and start over, on the Filter toolbar, click **Clear**, and then click **Confirm**.
- To delete a row, click the **Options menu** button for that row, and then click **Delete**.
- To hide a row in simple mode, while you are in detailed mode, click the **Options menu** button for that row, and then click **Hide in Simple Mode**.
- If you have a hidden row when viewing filter criteria in simple mode and you want to show that row again, then in detailed mode, you must click the **Options menu** button for that row, and then click **Show in Simple Mode**.
- You can set your personal options so that report filters and Advanced Find criteria always open in simple or detailed mode. More information: *Set Personal Options* (on page 201)

3. If the report offers parameters, if needed, modify the parameters and then click **View Report**.
4. Locate data in the report.
   - To view or change a record, click the first field in the row for the record. A separate Microsoft Dynamics CRM window will open with the record.
   - To view all records associated with a summary or chart report, click **Show All** at the bottom of the report. To navigate back to the original report, click the **Go back to the parent report** button .
   - To view detailed information about an area in a chart, click an area of the chart. To navigate back to the original report, click **Original Report** in the report title area.
   - To page through the report, on the Report toolbar, use the **Page Navigation** buttons. To locate a specific page, type a page number in the box and then press **Enter**.
   - To quickly locate specific information in your report, in **Find | Next**, type a few characters, and then click **Find**.
   - To sort a column, click the column title. The direction of sorting is indicated by the **Ascending sort** button or the **Descending sort** button .
   - To view or hide the filter summary, expand or collapse **Filter Summary**.
   - To update your report, click the **Refresh** button .
   - To hide or show the report parameters, click the **Show** / **Hide Parameters** button .
5. Print the report.

   On the Report toolbar, click the **Print** button .

If you are working offline using Microsoft Dynamics CRM for Outlook, on the Report toolbar, click the **Export** button , and select **MHTML (web archive)** format. Open the file, and on the **File** menu, click **Print**.

Tips

- If a chart doesn't display the first time you export a report to **MHTML (web archive)** format, export the report a second time.
- To print reports, you need a Reporting Services Microsoft ActiveX control. The first time you print a Reporting Services report from either Microsoft Dynamics CRM or Microsoft Dynamics CRM for Microsoft Office Outlook, you will see a prompt **Do you want to install this software?**.

  To install the required control, click **Install**.

6. Export the report.

   Important

   The exported report is temporary. If you need to save the exported report to a local file, use the viewing program to save the file to disk. The saved exported report is no longer connected to Microsoft Dynamics CRM. Therefore, it does not change if Microsoft Dynamics CRM data changes.

   d. Click the **Export** button and select a format to which you want to export the report.

      A second browser window is used to display the report, using a viewer associated with the export format you selected.

      The formats that are available are determined by the rendering extensions that are installed on the Microsoft SQL Server Reporting Services report server, and also by whether you are online or offline.

      - If you are working offline, only the **Excel** and **Acrobat (PDF) file** formats are available.

      If a viewer is not available for the format you select, you must select a different format or install the viewer.

      The following export formats are included in a default installation when you are online. The list of export formats available to you may vary from those listed here.

      - **XML file with report data**

        View the report as an XML file.

      - **CSV (comma delimited)**

        View the report as a text file, with fields separated by commas. This format includes all the row, column, and field labels.

        To export only the data, instead of using this format, export data from any list in Microsoft Dynamics CRM, including results of Advanced Find searches, into Microsoft Office Excel, and then save as a comma-delimited (CSV) file.

      - **Acrobat (PDF) file**

        View the report using a client-side PDF viewer. You must have Adobe Acrobat Reader to use this format.

        Choose this format for long reports, paginated reports, or reports that are delivered as a file.

- **MHTML (web archive)**

  View the report in Microsoft Internet Explorer, as a MIME-encoded HTML format that keeps images and linked content together with a report. For chart reports, if the chart is not displayed correctly the first time that you export the report, export the report again.

  Choose this format to view a report offline or for e-mailing the report.

- **Excel**

  View the report in Microsoft Office Excel. This format includes all the row, column, and field labels, in addition to report formatting.

  Large reports and reports with charts might not display with the expected formatting when exported in this file format. To export only the data, instead of using this format, from any list in Microsoft Dynamics CRM, including results of Advanced Find searches, export the data into Microsoft Office Excel, and then save as a comma-delimited (CSV) file. More information: *Export Data to Excel* (on page 61)

- **TIFF file**

  View the report in the default TIFF viewer. For some Windows clients, this is the Windows Pictures and Fax Viewer.

  Choose this format to a view a report in a page-oriented layout. The TIFF format is the recommended format for printing reports.

- **Word**

  View the report in Microsoft Office Word. This format includes all the row, column, and field labels, in addition to report formatting.

Tips

- If there is no report that gives you the information you need, you can either export data to Microsoft Office Excel, or create your own report. More information: *Export Data to Excel* (on page 61), Create and Work with Reports
- If a snapshot of a Reporting Services report exists, you can view it from the Reports area. To see if any snapshots exist for a report, click the **View Snapshots** button next to the report. If a snapshot exists, click the snapshot link to view the snapshot.

Note

If multiple Language Packs are installed, only reports that are marked for display in the language you specified in Personal Options will be visible. More information: *Set Personal Options* (on page 201)

Related Topics

Print Things 19
Running Reports and Analyzing Data 95
Customizing and Organizing Reports 95
Export Data to Excel 61
Default Reports 97

Manage Activities

Create or edit an activity

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

1. Navigate to activity records.

   In the Navigation Pane, click **Workplace**, and then under **My Work** click **Activities**.

   - OR -

   To work with activities associated with a record, open the record and then click **Activities**.

2. To add new activities from the **Activities** list, on the **Activities** tab in the **New** group, click the type of activity you want to add.

   - OR -

3. To add a new activity from a record, click **Add New Activity**. Select an activity type, and then click **OK**.

4. Enter the information that you want. At a minimum, entering information in the following boxes is useful when you or others in your organization refer to the activity at a later date:

   - **Subject**

     Enter a meaningful description that can help you easily identify the activity in the Activities list view. The subject field is required because, by default, most of the Activities views are sorted by it. This field is not related to Subjects, which are the hierarchical list of categories used to relate and organize information in Microsoft Dynamics CRM.

   - **Regarding**

     This field is used to link the activity to another record so that you can view the activity from the record. If you create a new activity from a record, this is automatically filled out.

   - **Owner**

     This box represents the user who owns the activity. By default, it is set to the user who creates the activity.

   - **Duration**

     If this activity is related to a case, make sure that you record the time you spend on the activity in this box. If the case is linked to a contract line, the durations of all the activities for this case are tallied and updated automatically in the related active contract. The total, which includes the totals from any other cases relating to that contract, can be adjusted manually before billing the customer. The maximum duration of an appointment or service activity is 10 days.

   - **Due**

     Enter the date and time that the activity is expected to take place or be completed. You can quickly sort on the **Due** field when you view activities.

Tip

- To automatically update the Regarding field with information from a record, click the **Expand** button in the right pane to open the Form Assistant pane, and then select a record.

5. Some activities also have the following optional fields:

   - **Sender**

     You can use this field to record the user in your organization who initiated an outgoing communication. Alternatively, if this is an incoming communication from a customer, you can select the lead, account, or contact who initiates the communication. The sender must be a valid Microsoft Dynamics CRM account, contact, or lead, but can also be a Microsoft Dynamics CRM user. By default, this box contains the name of the user who creates the activity.

   - **Recipient**

     This is the person, typically an account, contact, lead, or Microsoft Dynamics CRM user, that receives the communication.

   - **Category**, **Sub-Category**

     You can use these text fields to categorize tasks so that you can sort or view your tasks by category and/or sub-category.

6. Click **Save** or **Save and Close**.

   Tip

   If you are using the activity to track something that has already been completed, on the **File** menu, click **Save as Completed**.

   When you save an activity as completed, duplicates will not be detected.

   Notes

   - To create the same activity for multiple records, use a quick campaign. More information: *Work with Quick Campaigns* (on page 382)
   - You cannot edit multiple activities at once.
   - You cannot schedule recurring activities.
   - You cannot reactivate or edit a closed activity. However, you can add a note to a closed activity.
   - You cannot change one activity into another type of activity.
   - You cannot set reminders in Microsoft Dynamics CRM for Microsoft Office Outlook for faxes, phone calls, e-mails, letters, or campaign responses activities created in the Web application or Microsoft Dynamics CRM for Outlook.
   - When the duration of an activity is more than 60 minutes (an hour), the time you enter is converted into hours. When the activity is saved, the value is rounded up and might change from the entry that was originally displayed when it was converted from minutes into hours. Note that rounding is only observed on the hundredth of an hour. The exact value for the duration, however, is stored in the database in minutes, and this value is used to calculate the total billing time when resolving cases.
   - The letter and fax activities record when the letter or fax is sent or received. When you create the activity, you attach the letter or fax document, such as a Microsoft Office Word file, to the record.

With the mail merge feature, you can write your letter and include Microsoft Dynamics CRM data.
More information: *Create Customer-Ready Documents and Messages* (on page 164)

Related Topics

Manage Activities 23
Create an Activity in Outlook 460
Send Direct E-mail to Customers 171

Create and send an e-mail activity in the Microsoft Dynamics CRM Web application

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: E-mail Permissions

You can create and send e-mail activities in Microsoft Dynamics CRM from the **Activities** area. E-mail messages that are sent from Microsoft Dynamics CRM do not appear in the Microsoft Dynamics CRM mail folders in Outlook, unless synchronization is set up.

1. Start Microsoft Dynamics CRM.
2. In the Navigation Pane, click **Workplace**, and then click **Activities**.
3. On the **Activities** tab, in the **New** group, click **E-mail**.
4. On the **E-mail** tab, enter the following information:

   - **From**

     Locate and select the sender's name.

   - **To**

     Locate and select one or more recipients. You can click the **Lookup** button to search for and select records.

   - **Subject**

     Type a subject for your e-mail message.

   - **Duration**

     This field is not required, but if you are tracking the amount of time spent on cases, and this message is related to a case, enter the amount of time spent on this message.

   - **Due**

     If you are not sending your e-mail message immediately, enter a date to complete and send the message. The message is not sent automatically.

   Tip

- You can copy and paste content from Microsoft Office Word. This lets you take advantage of features such as spelling check and some text formatting. If your text is double-spaced, you can press SHIFT+ENTER to single-space lines of text.
- You can include an image if the file is hosted on a public Web site. Use the copy and paste feature of Microsoft Internet Explorer to include a link to the image in the message. The image is displayed as long as the receipient has access to the Web site.

You can also attach an article, template, or file to an e-mail activity.

To attach an article

a. To look up and select an article, on the Formatting toolbar, click **Insert Article**.

e. Use the **Search** tab to specify conditions or criteria to locate the article.

f. In the results list, select the article, and then click **OK**.

g. The article appears the body of in your e-mail message.

h. Type any additional text, or edit the article.

To attach an e-mail template

a. To look up and select an e-mail template, click **Insert Template**.

i. On the **Insert Template** dialog box, select the template you want to use. You can either use a global template, or a template specific to the record type you selected as the recipient. For example, account or customer.

j. Click **OK**.

k. The template appears in the body of your e-mail message and the subject line is updated with the subject line of the template.

l. Type any additional text or edit the text provided. Editing the text or subject line in the message does not change the template.

To attach a file

a. Save the activity.

m. On the **Attachments** tab, click **New E-mail Attachment**.

n. In the **Add Attachment** dialog box, in the **File Name** box, type the name of the file, or click **Browse** to locate the file that you want to attach.

o. Click **Attach**.

5. To send the message immediately, click **Send**.

   The message is sent and the new closed activity appears in Microsoft Dynamics CRM in the **Activities** area with an assigned message number appended to the subject. It also appears in Outlook in the Sent Items folder.

   - OR -

   To send the message at a later time, click **Save and Close**. The new draft activity appears in Microsoft Dynamics CRM in the **Activities** area. You can delete draft messages.

Important

After you save your e-mail message as a Microsoft Dynamics CRM e-mail activity, the saved message can be accessed by anyone who has access to your activities in Microsoft Dynamics CRM.

Notes

- You can view the sent date of an e-mail message on the **Activities** list. The **Actual End Date** is the date the message was sent and closed.
- You can forward or reply to an e-mail activity, but you cannot resend it.

  To reply to only the original sender, open the e-mail message. In the **Respond** group, click **Reply**.

  To reply to the original sender and to send copies to everyone who originally received the message, click **Reply All**.

  To forward the e-mail activity to new recipients, click **Forward**, and then select new recipients.
- There is no spell check built into Microsoft Dynamics CRM. There might be third-party solutions available. For more information, visit *Microsoft Dynamics CRM Solution Finder* (see Microsoft Dynamics CRM Solution Finder - *http://go.microsoft.com/fwlink/?LinkId=98752*).

Related Topics

Work with E-mail Activities 187
Create an Activity in Outlook 460
Manage Activities 23
Send Direct E-mail to Customers 171
Save Outlook Contacts, Tasks, and E-mail Messages as Microsoft Dynamics CRM Records 465
Sending and Receiving E-mail in Microsoft Dynamics CRM for Outlook 185
Work with E-mail Templates 187
Managing E-mail Activities 184

Close an activity

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

Activity types that can be closed

- Tasks
- Faxes
- Phone Calls
- Letters
- Appointments

- Service Activities
- Campaign Activities

Unless you have created an activity record by mistake, it is better to close or convert an activity than to delete it. You can view closed or converted activities at a later date for reference, or run reports to determine the success rate of your activities.

1. Navigate to activity records.

   In the Navigation Pane, click **Workplace**, and then under **My Work** click **Activities**.

   - OR -

   To work with activities associated with a record, open the record and then click **Activities**.

2. Open the activity that you want.

3. On the **Actions** menu, click **Close activity type**. For example, if you are in a task record, click **Close Task**.

4. In the confirmation dialog box, select the status that you want from the **Status** list, such as **Completed** or **Canceled**, and then click **OK**.

   Notes

   - When you close an activity, the activity becomes read-only and cannot be edited or reopened.
   - To view closed activities, do one of the following:
     - In the Activities list, select the **Closed Activities** view.
     - Use Advanced Find, and specify **Activity Status** in the search criteria.
     - From an Account, Contact, Lead, or Opportunity record, under **Common**, click **Closed Activities**. In the **Filter on** and **Include** lists, select the view options that you want.
   - It is not possible to close multiple activities at once.
   - The only way to close an e-mail activity is to send it. If you do not use Microsoft Dynamics CRM to send or receive e-mail, click **Send**. This will close the activity, but no e-mail message will be sent.

Convert an activity to an opportunity

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

Activity types that can be converted

- Faxes
- Phone Calls
- E-mail Messages
- Letters

- Appointments

1. Navigate to activity records.

   In the Navigation Pane, click **Workplace**, and then under **My Work** click **Activities**.

   - OR -

   To work with activities associated with a record, open the record and then click **Activities**.
2. Open the activity that you want.
3. On the Actions toolbar, click **Convert Activity**, and then click **To Opportunity**.
4. In the **Convert Activity to Opportunity** dialog box, enter information in the following boxes:

   - **Customer**

     You must click the **Lookup** button to select or create a new customer.

   - **Source Campaign**

     Click **Lookup** if you want to associate a source campaign with this activity.

   - **Actions**

     By default, Microsoft Dynamics CRM automatically completes the following operations during the conversion.

     - Close the activity as completed.
     - Open the new opportunity after the conversion.
     - Create a campaign response based on the information included in the opportunity.

       Important If you are converting an activity to an opportunity that is not associated with a Source Campaign, you must clear the **Record a closed campaign response** check box.

     To change the conversion operations, clear the associated check boxes.
5. In the **Convert Activity to Opportunity** dialog box, click **OK**.
6. Click **Save** or **Save and Close**.

   Note
   The originating activity becomes a related activity for the new opportunity. If the activity is open, it appears in the **Activities** list for the opportunity. If the activity is closed, it appears in the **Closed Activities** list.

Related Topics

Manage Activities 23
Managing Opportunities 310
Managing Leads 289

Convert an activity to a case

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

1. Navigate to activity records.

   In the Navigation Pane, click **Workplace**, and then under **My Work** click **Activities**.

   - OR -

   To work with activities associated with a record, open the record and then click **Activities**.

2. Open the activity that you want.

   Activity types that can be converted

   - Faxes
   - Phone Calls
   - E-mail Messages
   - Letters
   - Appointments

3. On the Actions toolbar, point to **Convert Activity** and then to **Case**.

4. In the **Convert Activity to Case** dialog box, enter information in the following boxes:

   - **Customer**

     You must click the **Lookup** button to select or create a new customer.

   - By default, Microsoft Dynamics CRM automatically completes the following operations during the conversion:

     - Close the activity as completed.
     - Open the new case after the conversion.

   To change the conversion operations, clear the associated check boxes.

5. In the **Convert Activity to Case** dialog box, click **OK**.

   Note
   The originating activity becomes a related activity for the new case. If the activity is open, it appears in the **Activities** list for the case. If the activity is closed, it appears in the **Closed Activities** list.

Related Topics

Work with Appointments 440
Work with E-mail Activities 187
Manage Activities 23

Convert an e-mail to another record type

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

1. Navigate to activity records.

   In the Navigation Pane, click **Workplace**, and then under **My Work** click **Activities**.

   - OR -

   To work with activities associated with a record, open the record and then click **Activities**.
2. Open the e-mail activity that you want to convert.
3. In the Actions toolbar, point to **Convert Activity**, and then click the record type that you want to convert to.
4. In the dialog box, type the appropriate information.
5. By default, Microsoft Dynamics CRM is set to perform specific operations when the conversion occurs. To change the conversion operations, clear the associated check boxes.
6. Click **OK**.

Related Topics

Work with E-mail Activities 187
Manage Activities 23
Sending and Receiving E-mail in Microsoft Dynamics CRM for Outlook 185

Assign to Queue or User Form

Use this form to assign an activity to another queue or user.

Can I do this task?

If the **Assign** button is not visible on the toolbar, the security role assigned to your account does not have permission to assign this type of record. To check your permissions for a specific record, open the record, click the **File menu** button , and then click **Properties**.

More information about specific permissions and performing this task while offline: Common Task Permissions

1. Navigate to activity records.

   In the Navigation Pane, click **Workplace**, and then under **My Work** click **Activities**.

- OR -

To work with activities associated with a record, open the record and then click **Activities**.

2. In the list of records, select the record that you want.

   Or, select multiple records

   - Select several records by pressing the CTRL key while you click each record.
   - Select a sequence of records by clicking the first record that you want, and then press the SHIFT key while you select the last record that you want.
   - Select all records on the page by selecting the **Select/clear all records on this page** check box at the top of the list.

   By default, the Microsoft Dynamics CRM Web application displays 50 records per page. You can increase this up to a maximum of 250 records per page to increase the number of records you can select at one time. To increase the number of records displayed per page:

   1. On the **File** menu, click **Options**.
   2. On the **General** tab, in the **Records Per Page** list, select the number of records to display per page.
   3. Click **OK**.

   This changes the number of items that is displayed for all lists, which may slow response time when you switch record types. Therefore, you might want to set it back to a smaller number when you are done with this bulk action.

3. In the **Collaborate** group, click **Assign**.
4. In the **Assign to Team or User** dialog box, type all or part of the queue or user name, and then click the **Lookup** button .
5. In the **Look Up Records** dialog box, in the **Look for** list, select the type of record you want to find.
6. In the **Search** box, type the first few letters of the name of the record to narrow your search, and then click the **Find** button .
7. In the list of records, select the check boxes for the records that you want to add, click **Add**, and then click **OK**.
8. On the **User or Queues** form, click **OK**.

Related Topics

Share or Assign Records and Views 52
Manage Activities 23

Add, edit, or delete a note

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

Record types that you can add notes to

- Accounts
- Appointments
- Campaigns
- Campaign Responses
- Cases
- Competitors
- Contacts
- Contracts
- Faxes
- Leads
- Letters
- Marketing Lists
- Opportunities
- Phone Calls
- Products
- Service Activities
- Tasks

1. Open the record that you want.
2. For most record types, click **Notes and Activities**:
   - On the E-mail form, click **Attachments**.
   - On the Service Activity form, click **Service Activity** .
   - On the Case form, click **Notes and Article**.
3. To add a note, click **Add a new note**.

   - OR -

   To open and edit a note, double-click the status row above the note, or right-click the note and then click **Open**.
4. In the **Note** form, you can make changes to the following:
   - **Title**

     Change the title of the note. Titles must have a length of 64 characters or less. Titles are not displayed in the notes list.
   - **Note content**

     Add, remove, or edit the note content.

- **Regarding**

  You can use this item to open and make changes to the activity or record that this note is associated with.

- **File Attachment** section

  Add or remove a file attachment. In the **File Name** box, type the name of the file, or click **Browse** to locate the file that you want to attach, and then click **Attach**.

Tips

- Each note can have only one attached file, so if you need to attach multiple files, create a note for each file.
- The maximum size of the file that you can attach to a record is defined by your system administrator. More information: System Settings Dialog Box - E-mail Tab

5. Click **Save** or **Save and Close**.

Tips

- To paste text from the Clipboard into a note, open the note, and then press CTRL+V.
- To use a tab in a note, copy the text from a file that includes the tab, and then use CTRL+V to paste the text into the note.

Note

To delete a note, double-click the status row of the note to open it, and then on the **Actions** menu, click **Delete Note**. If you do not have appropriate permissions to delete any of the records associated with the note, you will not be able to delete the note.

Related Topics

Add a Note or Attach a File 31

Remove an attached file

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

1. Open the record that you want.
2. For most record types, click **Notes and Activities**:
   - On the E-mail form, click **Attachments**.
   - On the Service Activity form, click **Service Activity** .
   - On the Case form, click **Notes and Article**.
3. Double-click the status row of the note that contains the attachment that you want to remove.

4. Remove the attached file.

   To keep the note, but remove the attachment:

   - In the **Note** form, in the **File Attachment** area, click **Remove**, click **OK**, and then click **OK** again.

   - OR -

   To remove the note and the attachment:

   - On the **Actions** menu, click **Delete Note**, and then click **OK**.

5. Click **Save** or **Save and Close**.

   Note
   You cannot update an attached file. Instead, save the file on your computer and edit the file, delete the attachment, and then attach the edited file.

Related Topics

Add a Note or Attach a File 31
Manage Activities 23
Delete Things 19

Attach a file

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

1. Open the record that you want.
2. On the **Add** tab, in the **Include** group, click **Attach File**.
3. In the **Manage Attachment** dialog box, type the path and name of the file to attach or click **Browse** to locate the file.
4. Click **Attach**, and then click **Close**.

   The attachment is added as a note.

5. Click **Save** or **Save and Close**.

   Notes

   - To add multiple files, for each file, repeat steps 2 through 4. Each attachment is added as a new note.
   - You cannot update an attached file. Instead, save the file on your computer and edit the file, delete the attachment, and then attach the edited file.
   - To add an attachment to an e-mail activity, first save the activity, and then on the **Attachments** tab, click **New E-mail Attachment**. After selecting or browsing for a file, click **Attach**.

- The maximum size of the file that you can attach to a record is defined by your system administrator. More information: System Settings Dialog Box - E-mail Tab
- The types of files that can be attached are defined by your system administrator. More information: Manage System Settings

Related Topics

Add a Note or Attach a File 31

Managing E-mail Activities 184

Edit Multiple Records

Caution When you edit or delete multiple records, you cannot undo the changes.

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

Record types that can be bulk edited

- Accounts
- Cases
- Contacts
- Leads
- Marketing Lists
- Opportunities

1. In any list, select multiple records:
   - Select several records by pressing the CTRL key while you click each record.
   - Select a sequence of records by clicking the first record that you want, and then press the SHIFT key while you select the last record that you want.
   - Select all records on the page by selecting the **Select/clear all records on this page** check box at the top of the list.

   Tip

   By default, the Microsoft Dynamics CRM Web application displays 50 records per page. You can increase this up to a maximum of 250 records per page to increase the number of records you can select at one time. To increase the number of records displayed per page:

   1. On the **File** menu, click **Options**.
   2. On the **General** tab, in the **Records Per Page** list, select the number of records to display per page.
   3. Click **OK**.

This changes the number of items that is displayed for all lists, which may slow response time when you switch record types. Therefore, you might want to set it back to a smaller number when you are done with this bulk action.

2. In the **Records** area, click **Edit**.
3. In the **Edit Multiple Records** form, make the changes.

   This changes the fields in which you enter data for all selected records. The other fields in the selected records do not change.
4. Click **Save**.

Notes

- You cannot edit multiple records for activities, lookup fields, or notes.
- You cannot use this method to clear data in a field.
- You cannot use this form to change the status of records. To change the status for a group of leads, add them to a marketing list. More information: *Work with Marketing Lists* (on page 389)

Related Topics

Edit Multiple Records 40
Check for duplicates 47
Find Things 9

Delete records

Can I do this task?

If the **Delete** button is not visible on the toolbar, the security role assigned to your account does not have permission to delete this type of record. To check your permissions for a specific record, open the record, click the **File menu** button , and then click **Properties**.

If you are deleting a record that has child records, you can delete it only if you also have permission to delete any child records.

More information about specific permissions and performing this task while offline: Common Task Permissions

1. In any list of records, select the record that you want to delete.

   - OR -

   In any list, select multiple records:

   - Select several records by pressing the CTRL key while you click each record.
   - Select a sequence of records by clicking the first record that you want, and then press the SHIFT key while you select the last record that you want.

- Select all records on the page by selecting the **Select/clear all records on this page** check box at the top of the list.

Tip

By default, the Microsoft Dynamics CRM Web application displays 50 records per page. You can increase this up to a maximum of 250 records per page to increase the number of records you can select at one time. To increase the number of records displayed per page:

1. On the **File** menu, click **Options**.
2. On the **General** tab, in the **Records Per Page** list, select the number of records to display per page.
3. Click **OK**.

This changes the number of items that is displayed for all lists, which may slow response time when you switch record types. Therefore, you might want to set it back to a smaller number when you are done with this bulk action.

2. On the Actions toolbar, click the **Delete** button .
3. If you are deleting accounts or contacts, you have the option to deactivate a record instead of deleting it. In the **Delete Confirmation** dialog box:
   - To delete the record, click **Delete**.
   - To deactivate the record, click **Deactivate**.

   For other record types, in the **Confirm Deletion** dialog box, click **OK**.

Notes

- When you delete a record, all its relationships to other records are also deleted.
- If a record has child records, and you have permission to delete the child records, deleting a record also deletes the child records.

Related Topics

Edit Multiple Records....40
Delete Things....19
Add a Note or Attach a File....31
Check Your Permissions for a Record....50

Using Connect to Define How Records Relate

In Microsoft Dynamics CRM, create and view the relationship between two records by using **Connect**. When you open a record, view all of the connections between it and other records by clicking **Connections**.

Microsoft Dynamics CRM offers several different roles you can use to identify your connection types. The options are not limited. Your system administrator can add new role types.

Check for duplicates

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

Duplicate detection can take place only if duplicate detection is enabled in **Duplicate Detection Settings** and if at least one duplicate-detection rule exists for the record type.

1. Start duplicate detection.

   Start duplicate detection from any list of records, including results of an Advanced Find search

   a. In any list, on the **Actions** menu, click **Detect Duplicates**.

   a. To search selected records, click **For Selected Records**.

      - OR -

      To search all records on all pages of the current view, click **For All Records on All Pages**.

      Start duplicate detection from the Workplace, Tools menu, or Settings area

   b. On the **Tools** menu, click **Duplicate Detection**.

      - OR -

      In the **Workplace**, in the **My Work** section, click **Duplicate Detection**, and then click **New**.

      - OR -

      In the Navigation Pane, click **Settings**, click **Data Management**, click **Duplicate Detection Jobs**, and then click **New**.

   c. Click **Next**.

   d. In the **Look for** list, click a record type.

      The **Look for** list includes only record types that have published duplicate-detection rules. More information: Work with Duplicate-detection Rules

   e. Select criteria to define the records that Microsoft Dynamics CRM will use to check for duplicates:

      - To use criteria from a saved view:

      In the **Use Saved View** list, click a view from the System Views or My Views section.

      - OR -

      - To use new criteria:

      For each criteria to use in the search, click an item in the **Select** list. More information: Work with Advanced Find

   Tips

   - To make sure that you have the records you want, click **Preview Records**.
   - To change the columns that are displayed in the preview, or the column order, sort order, or column widths, click **Edit Columns**.

- To save these criteria to use later, click **Save As**. This saved view will be available in the **My Views** section of the **View** box.

f. Click **Next**.

2. Specify:
   - The name of the duplicate-detection job.
   - When you want the duplicate-detection job to start. You also can specify to run the job on a regular schedule.
   - Whether you want notification sent to you and to other users when the background duplicate-detection job completes.
3. Click **Next**, and then click **Submit**.

   The duplicate detection job processes in the background. If you requested notification, you will receive an e-mail notification when the job completes, with a link to the page where you can resolve duplicates.
4. To view the potential duplicates, after the duplicate-detection job completes, in **Workplace**, under **My Work**, click **Duplicate Detection**.
5. Open your duplicate-detection job.
6. Under **Related**, click **View Duplicates**.

   The top list displays all records that have potential duplicates. When you select a record in the top list, the bottom list shows all the potential duplicates for that record.
7. In the top list of records that may have duplicates, select a record.
8. In the list of potential duplicate records, for each potential duplicate record found, select the record, and then do any of the following actions:

Action	**Do this**
View the contents of a record to help you decide what to do	Double-click the record.
Edit the record	On the **Actions** menu, click **Edit**.
Deactivate the record	a. On the **Actions** menu, click **Deactivate**. b. In the confirmation dialog box, click **OK**.
Merge record by using the record in the top list as the master	a. In the **Records** group, click **Merge**. b. Click **Automatically**.

Merge record by choosing the master record	a. In the **Records** group, click **Merge**. b. Click **Select Master**. c. In the **Merge Records** dialog box, select which record to make the new master record. d. Select the fields from each record that you want to include in the master record. Fields that are shaded will overwrite the corresponding unshaded field during the merge operation. e. When you are ready to merge the two records, click **OK**. f. When you receive the message **The selected records are merged and the subordinate record is deactivated**, click **OK**.
Delete the record	a. On the Actions toolbar, click the **Delete** button . b. In the **Select Delete or Deactivate** dialog box, click **Delete**, and then in the confirmation dialog box, click **OK**.

9. When you have finished resolving duplicates, click **Close**.

Notes

- Your system administrator or system customizer determines the criteria for identifying a record as a potential duplicate. More information: *Requesting User Interface Changes* (on page 220)
- If you enter a duplicate record within a few minutes of entering the first record, Microsoft Dynamics CRM will not detect the duplicate record. The matchcodes for new and updated records are created every five minutes, rather than as a record is created.
- To refresh the list of duplicate records, you must run a new duplicate-detection job:
  - After a record has been merged or deactivated, the record is still displayed on the bottom list.
  - You can use the **Modified On** column to determine whether a record was modified after the duplicate-detection job was run.

- After a record has been deleted, merged or deactivated, the record is still displayed on the top list.

Related Topics

Enable and Disable Duplicate Detection 70

Avoiding Duplicate Records 69

Merge Records

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

You can merge two lead, account, or contact records.

1. Select a record. Then, press the Ctrl key while you select the second record.
2. In the **Records** group, click **Merge**.
3. In the **Merge Records** dialog box, select which record to make the new master record.
4. Select the fields from each record that you want to include in the master record. Fields that are shaded will overwrite the corresponding unshaded field during the merge operation.
5. When you are ready to merge the two records, click **OK**.
6. When you receive the message **The selected records are merged and the subordinate record is deactivated**, click **OK**.

   Note
   When you merge two records, duplicates will not be detected.

Related Topics

Check for duplicates 47
Find Things 9

View Your User Profile

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

Your user profile displays information about you, including general information such as your contact information and addresses, what teams and resource groups you belong to, which services you can perform, and your work hours and security roles. This information is visible to the entire organization. Depending on your security role, you may be able to make changes to your user profile.

If you are working in Microsoft Dynamics CRM for Outlook, you can view this information from the User form. More information: Work with Your User Record and Work Hours

1. Click the **File** tab, and then click **Options**.
2. In the **Set Personal Options** dialog box, click the **General** tab.
3. At the bottom of the page, click the **View your user information** link.

   The User form with your information opens.
4. To view details or make changes, under **Common** or **Service** click any of the following:
   - Teams

- Roles
- Quotas
- Work Hours
- Services
- Resource groups
- Workflows

5. To close the form, on the **File** menu, click **Close**.
6. To close the **Set Personal Options** dialog box, click **OK**.

Related Topics

Check Your Permissions for a Record 50
Set Personal Options 201

1. In the list of records, open the record that you want.
2. Click the **File** tab.
3. Click **Properties**.

Tip
If you do not have permissions that you need to do your job, contact your manager. More information: *Requesting User Interface Changes* (on page 220)

Related Topics

Check Your Permissions for a Record 50

Start an On-Demand Workflow

If you or your organization have created on-demand workflows, you can apply these workflows to records that appear in a list.

Concepts:

- *Creating and Using Workflows* (on page 223)
- Monitoring and Managing Workflows

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

1. Open the list of records that contains the record to which you want to apply a workflow, such as leads or cases.
2. Select the record or records to which you want to apply a workflow.
3. In the **Process** group, click **Run Workflow**.
4. In the **Look Up Record** dialog box, select the workflow that you want to run, and then click **OK**.

   In the confirmation message, click **OK**.

Share or Assign Records and Views

When you share a record with another user, you are giving that user specific permissions, such as Read, Write, or Delete, to that record.When you assign a record to another user, you are making that user the owner of the record.

Share a record

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

1. Record types that can be shared
   - Accounts
   - Cases
   - Campaigns
   - Contacts
   - Contracts
   - Invoices
   - Leads
   - Marketing Lists
   - Opportunities
   - Orders
   - Quotes
   - Reports
2. In the list of records, select the record that you want.
3. Or, select multiple records
   - Select several records by pressing the CTRL key while you click each record.

- Select a sequence of records by clicking the first record that you want, and then press the SHIFT key while you select the last record that you want.
- Select all records on the page by selecting the **Select/clear all records on this page** check box at the top of the list.

By default, the Microsoft Dynamics CRM Web application displays 50 records per page. You can increase this up to a maximum of 250 records per page to increase the number of records you can select at one time. To increase the number of records displayed per page:

1. On the **File** menu, click **Options**.
2. On the **General** tab, in the **Records Per Page** list, select the number of records to display per page.
3. Click **OK**.

This changes the number of items that is displayed for all lists, which may slow response time when you switch record types. Therefore, you might want to set it back to a smaller number when you are done with this bulk action.

4. On the Actions toolbar, click **Actions**, and then click **Sharing**.
5. In the sharing dialog box, under **Common Tasks**, click **Add User/Team**.
6. In the **Look Up Records** dialog box, in the **Look for** list, select the type of record you want to find.
7. In the **Search** box, type the first few letters of the name of the record to narrow your search, and then click the **Find** button .
8. In the list of available records, click a user or team to select it, and then click the **Add Selected Records** button to add the user or team to the **Selected records** list.
9. Repeat step 6 to add more users or teams.
10. Click **OK**.
11. In the sharing dialog box, select the type of share access that you want. The available permissions are: Read, Write, Delete, Append, Assign, or Share.
12. Click **OK**.

Tips

- To see records that have been shared with you, use Advanced Find to create a saved view that includes the owner column. If you can access the record, but are not the owner, it has been shared with you.
- If you want to limit the permissions on a record you own, you can share the record with yourself. Then, you can limit the permissions on the record. For example, if you clear the delete permission on a record, you will not be able to delete that record.

Notes

To cancel any changes that you have made and retain the previous permissions settings, click **Reset**.

To select or clear all permissions on a selected item, click **Toggle All Permissions of the Selected Items**.

- You cannot create a new contact or account that is shared by default.
- When you share a record, the user with whom you share the record inherits the privileges on certain associated records. For example, when you share a contact, the user is also granted the

same privileges on the parent account. To prevent privileges from cascading, a user with the appropriate security role can change this behavior by customizing the relationship definition for the record type. More information: Work with Entities

Related Topics

Share or Assign Records and Views....52

Edit Multiple Records....40

Share a saved view

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

1. On the Standard toolbar, click **Advanced Find**, and then click the **Saved Views** tab.
2. Select the view. On the Actions toolbar, click **Actions**, and then click **Sharing**.
3. In the sharing dialog box, under **Common Tasks**, click **Add User/Team**.
4. In the **Look Up Records** dialog box, in the **Look for** list, select the type of record you want to find.
5. In the **Search** box, type the first few letters of the name of the record to narrow your search, and then click the **Find** button .
6. In the list of available records, click a user or team to select it, and then click the **Add Selected Records** button to add the user or team to the **Selected records** list.
7. Click **OK**.
8. In the sharing dialog box, select the type of share access that you want. The available permissions are: Read, Write, Delete, Append, Assign, or Share.
9. Click **OK**.

The saved view will show up in the **My Views** section of your coworker's **View** list.

Tips

- To cancel any changes that you have made and retain the previous permissions settings, click **Reset**.
- To select or clear all permissions on a selected item, click **Toggle All Permissions of the Selected Items**.

Related Topics

Share or Assign Records and Views....52

Unshare or change sharing for a record

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

1. In the list of records, select the record that you want.

   Or, select multiple records

   - Select several records by pressing the CTRL key while you click each record.
   - Select a sequence of records by clicking the first record that you want, and then press the SHIFT key while you select the last record that you want.
   - Select all records on the page by selecting the **Select/clear all records on this page** check box at the top of the list.

   By default, the Microsoft Dynamics CRM Web application displays 50 records per page. You can increase this up to a maximum of 250 records per page to increase the number of records you can select at one time. To increase the number of records displayed per page:

   1. On the **File** menu, click **Options**.
   2. On the **General** tab, in the **Records Per Page** list, select the number of records to display per page.
   3. Click **OK**.

   This changes the number of items that is displayed for all lists, which may slow response time when you switch record types. Therefore, you might want to set it back to a smaller number when you are done with this bulk action.
2. On the Actions toolbar, click **Actions**, and then click **Sharing**.
3. To remove a user or team, in the row for the user or team whose rights you want to change, select the check box, and then under **Common Tasks** click **Remove Selected Items**.

   - OR -

   To edit permissions on a record for a user or team, select or clear one or more permissions check boxes, such as **Read** or **Delete**.
4. Click **OK**.

   Notes

   - To cancel any changes that you have made and retain the previous permission settings, click **Reset**.
   - To select or clear all permissions on a selected item, click **Toggle All Permissions of the Selected Items**.

Related Topics

Share or Assign Records and Views....52
Edit Multiple Records....40
Check Your Permissions for a Record....50

Assign a record to a user

Can I do this task?

If the **Assign** button is not visible on the toolbar, the security role assigned to your account does not have permission to assign this type of record. To check your permissions for a specific record, open the record, click the **File menu** button , and then click **Properties**.

More information about specific permissions and performing this task while offline: Common Task Permissions

1. In the list of records, select the record that you want.

   Or, select multiple records

   - Select several records by pressing the CTRL key while you click each record.
   - Select a sequence of records by clicking the first record that you want, and then press the SHIFT key while you select the last record that you want.
   - Select all records on the page by selecting the **Select/clear all records on this page** check box at the top of the list.

   By default, the Microsoft Dynamics CRM Web application displays 50 records per page. You can increase this up to a maximum of 250 records per page to increase the number of records you can select at one time. To increase the number of records displayed per page:

   1. On the **File** menu, click **Options**.
   2. On the **General** tab, in the **Records Per Page** list, select the number of records to display per page.
   3. Click **OK**.

   This changes the number of items that is displayed for all lists, which may slow response time when you switch record types. Therefore, you might want to set it back to a smaller number when you are done with this bulk action.
2. In the **Collaborate** group, click **Assign**.
3. In the **Assign** dialog box, click:

   - **Assign to me**

     Use this option to assign the record to yourself.

     - OR -

- **Assign to another user**

  Click the **Lookup** button, type a part of the user's name, click the **Find** button, double-click the user's name, and then to close **Look Up Records** dialog box, click **OK**.

4. Click **OK**.

Tips

- You can create your own Advanced Find view that includes records belonging to users to whom you normally assign records.
- If you have a security role with needed permissions, you can reassign all records belonging to one user to another user.
  a. In the Navigation Pane, click **Settings**, click **Administration**, and then click **Users**.
  b. Open the record for the user whose records you want to reassign.
  c. On the **Actions** menu, click **Reassign Records**, and then click **Assign to another user**.
  d. Click the **Lookup** button, type a part of the user's name, click the **Find** button, double-click the user's name, and then to close **Look Up Records** dialog box, click **OK**.

Notes

- To assign a report to a different user:
  a. Select the report.
  b. On the Actions toolbar toolbar, click **Edit Report**.
  c. Click the **Administration** tab, and then select a new owner.

  You can only assign a report once it has been saved.
- You cannot assign records to teams. To give a team access to a record, share the record with the team.
- Your system administrator may have enabled reassigned records to be automatically shared with the original owner. More information: Manage System Settings

Related Topics

Share or Assign Records and Views 52

Assign a saved view to a user

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

1. On the Standard toolbar, click **Advanced Find**, and then click the **Saved Views** tab.
2. Select the view, and then on the Actions toolbar, click the **Assign** button .
3. In the **Assign** dialog box, click:
   - **Assign to me**

     Use this option to assign the record to yourself.

     - OR -
   - **Assign to another user**

     Click the **Lookup** button , type a part of the user's name, click the **Find** button , double-click the user's name, and then to close **Look Up Records** dialog box, click **OK**.
4. Click **OK**.

Related Topics

Share or Assign Records and Views 52

Assign to Queue or User Form

Use this form to assign an activity to another queue or user.

Can I do this task?

If the **Assign** button is not visible on the toolbar, the security role assigned to your account does not have permission to assign this type of record. To check your permissions for a specific record, open the record, click the **File menu** button and then click **Properties**.

More information about specific permissions and performing this task while offline: Common Task Permissions

1. Navigate to activity records.

   In the Navigation Pane, click **Workplace**, and then under **My Work** click **Activities**.

   - OR -

   To work with activities associated with a record, open the record and then click **Activities**.
2. In the list of records, select the record that you want.

   Or, select multiple records
   - Select several records by pressing the CTRL key while you click each record.
   - Select a sequence of records by clicking the first record that you want, and then press the SHIFT key while you select the last record that you want.
   - Select all records on the page by selecting the **Select/clear all records on this page** check box at the top of the list.

By default, the Microsoft Dynamics CRM Web application displays 50 records per page. You can increase this up to a maximum of 250 records per page to increase the number of records you can select at one time. To increase the number of records displayed per page:

1. On the **File** menu, click **Options**.
2. On the **General** tab, in the **Records Per Page** list, select the number of records to display per page.
3. Click **OK**.

This changes the number of items that is displayed for all lists, which may slow response time when you switch record types. Therefore, you might want to set it back to a smaller number when you are done with this bulk action.

3. In the **Collaborate** group, click **Assign**.
4. In the **Assign to Team or User** dialog box, type all or part of the queue or user name, and then click the **Lookup** button .
5. In the **Look Up Records** dialog box, in the **Look for** list, select the type of record you want to find.
6. In the **Search** box, type the first few letters of the name of the record to narrow your search, and then click the **Find** button .
7. In the list of records, select the check boxes for the records that you want to add, click **Add**, and then click **OK**.
8. On the **User or Queues** form, click **OK**.

Related Topics

Share or Assign Records and Views 52
Manage Activities 23

Assign a case to a user or queue

Can I do this task?

This task requires permissions that are found in all default service security roles. More information about specific permissions and performing this task while offline: Service Permissions

After a case is created, it can be assigned to another user or to a team. After accepting a case, the assigned user can continue working with the customer.

1. In the Navigation Pane, click **Service**, and then click **Cases**.
2. In the list of cases, select the case that you want to assign.

   Or, select multiple records

   - Select several records by pressing the CTRL key while you click each record.

- Select a sequence of records by clicking the first record that you want, and then press the SHIFT key while you select the last record that you want.
- Select all records on the page by selecting the **Select/clear all records on this page** check box at the top of the list.

By default, the Microsoft Dynamics CRM Web application displays 50 records per page. You can increase this up to a maximum of 250 records per page to increase the number of records you can select at one time. To increase the number of records displayed per page:

1. On the **File** menu, click **Options**.
2. On the **General** tab, in the **Records Per Page** list, select the number of records to display per page.
3. Click **OK**.

This changes the number of items that is displayed for all lists, which may slow response time when you switch record types. Therefore, you might want to set it back to a smaller number when you are done with this bulk action.

3. In the **Collaborate** group, click **Assign**.
4. In the **Assign to Team or User** dialog box, click **Assign to another user or team**.
5. Click the **Lookup** button and select the record.
6. Click **OK**.

Note
An assigned case belongs to the user who created it until it is accepted by another user.

Related Topics

Work with Cases 451
Edit Multiple Records 40
Supporting Customer Service with Microsoft Dynamics CRM 451

Make a report available to all Microsoft Dynamics CRM users

Can I do this task?

This task requires the System Administrator or System Customizer security role or equivalent permissions. More information about specific permissions and performing this task while offline: Report Permissions

1. In the Navigation Pane, click **Workplace**, and then under **My Work**, click **Reports**.
2. Select the report that you created.
3. On the **Reports** tab, in the **Records** group, click **Edit**.
4. On the **Actions** menu, click **Make Report Available to Organization**.

Note

To revert a report back to a personal report, on the **Actions** menu, click **Revert to Personal Report**.

Related Topics

Share or Assign Records and Views 52
Running Reports and Analyzing Data 95
Customizing and Organizing Reports 95

Send or Copy a Shortcut

Only another Microsoft Dynamics CRM user who has permission to see the view or the record will be able to open the record.

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

You can send a link to a specific record or group of selected records in Microsoft Dynamics CRM in an e-mail message to any user.

This feature does not use Microsoft Dynamics CRM e-mail; it uses your default Microsoft Internet Explorer e-mail. If the person receiving the e-mail does not have permissions to the view, they will receive an error. Not all views are available. No activity is created for this action.

You can also copy the shortcut and paste it into any document.

1. In the list of records, select the record that you want.

   Or, select multiple records

   - Select several records by pressing the CTRL key while you click each record.
   - Select a sequence of records by clicking the first record that you want, and then press the SHIFT key while you select the last record that you want.
   - Select all records on the page by selecting the **Select/clear all records on this page** check box at the top of the list.

   By default, the Microsoft Dynamics CRM Web application displays 50 records per page. You can increase this up to a maximum of 250 records per page to increase the number of records you can select at one time. To increase the number of records displayed per page:

   1. On the **File** menu, click **Options**.
   2. On the **General** tab, in the **Records Per Page** list, select the number of records to display per page.

3. Click **OK**. This changes the number of items that is displayed for all lists, which may slow response time when you switch record types. Therefore, you might want to set it back to a smaller number when you are done with this bulk action.

2. Do one of the following:

   Send a shortcut in an e-mail

   a. On the Actions toolbar, click **E-mail a Link**, and then click **Of Selected Item**.

   b. Complete the e-mail form and send.

   Tip

   If you are working in Microsoft Dynamics CRM for Outlook and you want to track this e-mail, you can use **Track in CRM**.

   Copy a shortcut

   a. On the Actions toolbar, click **Copy a Link**, and then click **Of Selected Item**.

   g. Paste the shortcut into any application that supports copy and paste. For example, in Microsoft Office Word, press CTRL+V.

   Important

   The shortcut is not a snapshot of the data, but a link to the live data.

Related Topics

Find Things.....9

Save Outlook Contacts, Tasks, and E-mail Messages as Microsoft Dynamics CRM Records 465

Assign a case to a user or queue

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

You can send a link to a specific saved view in Microsoft Dynamics CRM in an e-mail message to any user.

This feature does not use Microsoft Dynamics CRM e-mail; it uses your default Microsoft Internet Explorer e-mail. If the person receiving the e-mail does not have permissions to the view, they will receive an error. Not all views are available. No activity is created for this action.

You can also copy the shortcut and paste it into any document.

Pages that you cannot e-mail or copy

- Contract Template list
- Article list

1. In any available, saved view, do one of the following:

   Send a shortcut in an e-mail

   a. On the Actions toolbar, click **E-mail a Link**, and then click **Of Selected Item**.

   b. Complete the e-mail form and send.

   Tip

If you are working in Microsoft Dynamics CRM for Outlook and you want to track this e-mail, you can use **Track in CRM**.

   Copy a shortcut

   a. On the Actions toolbar, click **Copy a Link**, and then click **Of Current View**.

   b. Paste the shortcut into any application that supports copy and paste. For example, in Microsoft Office Word, press CTRL+V.

   Important

   The shortcut is not a snapshot of the data, but a link to the live data.

Related Topics

Find Things 9

Save Outlook Contacts, Tasks, and E-mail Messages as Microsoft Dynamics CRM Records 465

Export Data to Excel

You can export any list to Microsoft Office Excel, including the results of an Advanced Find search.

You can export to a static or dynamic Excel worksheet or to a PivotTable.

Export data to an Excel static worksheet

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

By default, an exported worksheet includes the fields that are displayed in the list, using the same field order, sorting, and field widths.

To make changes to the columns in an Advanced Find View, click **Edit Columns**. You can make the following types of changes:

Change the column order

To change the column order, select a column heading, such as **Account Name**, and then under **Common Tasks**, click the **Move Left** button or the **Move Right** button to move the column.

Add columns

a. To add columns to the export list, click **Add Columns**.

b. To add columns for the main record type, select it, and then in the **Add Columns** list, click to select fields that you want to add as columns.

c. To add columns from related records, first select the related record type, and then in the **Add Columns** list, click to select fields that you want to add as columns.

d. Click **OK**.

Configure sorting

To change the sort order, click **Configure Sorting**, in the **Column** list, select the column that you want to sort, in the **Order** area, click **Ascending Order** or click **Descending Order**, and then click **OK**.

You cannot sort on columns from related record types.

Change column width

To change the column width that will appear in the Excel worksheet, select a column heading, such as **Account Name**, click **Change Properties**. In the **Change Column Properties** dialog box, select the width (in pixels) that you want, and then click **OK**.

Remove columns

To remove a column, select the column heading that you want to remove, and under **Common Tasks**, click **Remove**, and then in the confirmation message, click **OK**.

You cannot change the columns for a system view, such as **All Active Accounts**. You must either customize the view, which requires the System Administrator or System Customizer security role, or use Advanced Find to create your own view based on the current view. To create your own view, with the system view open, click **Advanced Find**.

1. In the **Data** group, click **Export to Excel**.
2. In the **Export Data to Excel** dialog box, click **Static worksheet with records from this page**.

   - OR -

   In the **Export Data to Excel** dialog box, click **Static worksheet with records from all pages in the current view**.

   The second option is visible only when your view includes more than one page of records.

   Note:

   If you are exporting the data so that you can make changes and import it back into Microsoft Dynamics CRM, select the **Make this data available for re-importing by including required column headings** check box.
3. Click **Export**.
4. To view the static worksheet, click **Open**.

You will see a message that says the file that you are trying to open is in a different format than specified by the file extension. Click **Yes**.

5. Save the exported data to a file.

   If you are using Microsoft Office Excel 2007, click the Microsoft Office Button , and then click **Save**.

   If you are using Microsoft Excel 2010, on the **File** tab, click **Save**.

   Tip

   You can e-mail a static exported worksheet to anyone, or store it in a shared file. Anyone who opens the file will see all the data in the file, whether or not they are a Microsoft Dynamics CRM user or have privileges to view the data in Microsoft Dynamics CRM.

   Notes

   - In Microsoft Dynamics CRM, money values are exported to Microsoft Office Excel as numbers. After you have completed the export, to format the data as currency, see the Excel Help topic titled “Display numbers as currency.”
   - By default, in Microsoft Dynamics CRM, you cannot export a list of more than 10,000 records at a time to a static Excel worksheet.
   - By default, Microsoft Dynamics CRM lists up to 50 records per page. If there is more than one page of records available to view in the list of records, use the **Page** arrows at the bottom of the list to view the additional pages.

Related Topics

Export Data to Excel 61
Create Customer-Ready Documents and Messages 164
Write a Report Using Report-Writing Tools 112
Running Reports and Analyzing Data 95

Export data to an Excel PivotTable

Can I do this task?

Important: To refresh data in a dynamic Excel PivotTable or worksheet, you must have Microsoft Dynamics CRM for Outlook installed. More information: Install Microsoft Dynamics CRM for Outlook

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

1. In any area with a list of records, on the **<Record Type>** tab, in the **Share Data** group, click the **Export to Excel**.
2. Click **Dynamic PivotTable**.
3. To add or remove a column in the report, click **Select Columns**.

4. In the **Select PivotTable Columns** list, select or clear the check boxes for the fields as needed, and then click **OK**.

   By default, the **PivotTable Field List** includes only fields that are displayed in the **Select PivotTable Columns** list.

5. Click **Export**.

6. Open the file containing the PivotTable:

   a. To view the PivotTable, click **Open**.

   h. If you are using Microsoft Office Excel 2007:

   - You will see a message that says the file that you are trying to open is in a different format than specified by the file extension. Click **Yes**.
   - If you see the security warning **Data connections have been disabled**, click **Options**, click **Enable this content**, and then click **OK**.

   If you are using Microsoft Excel 2010:

   - You will see a message that says the file that you are trying to open is in a different format than specified by the file extension. Click **Yes**.
   - You will see a message that says that the file was opened from a potentially unsafe location. Click **Enable Editing**.
   - If you see the security warning **Data connections have been disabled**, click **Enable Content**, and then click **OK**.

7. Drag the fields from the **PivotTable Field List** to the PivotTable. For more information, see Microsoft Office Excel Help.

8. To refresh data in the file, on the **Data** tab in the **Connections** group, click **Refresh All**.

9. Save the exported data to a file.

   If you are using Microsoft Office Excel 2007, click the Microsoft Office Button , and then click **Save**.

   If you are using Microsoft Excel 2010, on the **File** tab, click **Save**.

   Each time you open the file, if you have the Microsoft Dynamics CRM for Outlook installed, you will have the option to refresh data from Microsoft Dynamics CRM.

   Tips

   - If you export a list to a dynamic worksheet or PivotTable that you think will be useful to other Microsoft Dynamics CRM users, you can add the list as a report, and then share it with others or make it available to all Microsoft Dynamics CRM users.
   - If the recipients are in the same domain as you, and are Microsoft Dynamics CRM users, you can e-mail a dynamic Excel file, or store it as a shared file. When recipients open the dynamic file, they will see data they have permission to view in Microsoft Dynamics CRM, so the data they see may be different from what you see.

Notes

- In Microsoft Dynamics CRM, money values are exported to Microsoft Office Excel as numbers. After you have completed the export, to format the data as currency, see the Excel Help topic titled “Display numbers as currency.”
- You must use Excel 2007 or Excel 2010 to export a list to a PivotTable.
- Some system views, such as Accounts: No Campaign Activities in Last 3 Months, can be exported only to a static Excel worksheet.

Related Topics

Export Data to Excel 61
Create Customer-Ready Documents and Messages 164
Write a Report Using Report-Writing Tools 112
Running Reports and Analyzing Data..... 95

Export data to an Excel dynamic worksheet

Can I do this task?

Important: To refresh data in a dynamic Excel PivotTable or worksheet, you must have Microsoft Dynamics CRM for Outlook installed. More information: Install Microsoft Dynamics CRM for Outlook

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

Export data that is dynamic in nature to an Excel dynamic worksheet so that you can refresh the worksheet and get the most current data every time you open the worksheet.

1. In any area with a list of records, on the **<Record Type>** tab, in the **Share Data** group, click the **Export to Excel**.
2. Click **Dynamic worksheet**.
3. By default, an exported worksheet includes the fields that are displayed in the list, using the same field order, sorting, and field widths.

   To make changes to the columns, click **Edit Columns**. You can make the following types of changes:

   Change the column order

   To change the column order, select a column heading, such as **Account Name**, and then under **Common Tasks**, click the **Move Left** button or the **Move Right** button to move the column.

   Add columns

   a. To add columns to the export list, click **Add Columns**.

   b. To add columns for the main record type, select it, and then in the **Add Columns** list, click to select fields that you want to add as columns.

c. To add columns from related records, first select the related record type, and then in the **Add Columns** list, click to select fields that you want to add as columns.

d. Click **OK**.

Configure sorting

To change the sort order, click **Configure Sorting**, in the **Column** list, select the column that you want to sort, in the **Order** area, click **Ascending Order** or click **Descending Order**, and then click **OK**.

You cannot sort on columns from related record types.

Change column width

To change the column width that will appear in the Excel worksheet, select a column heading, such as **Account Name**, click **Change Properties**. In the **Change Column Properties** dialog box, select the width (in pixels) that you want, and then click **OK**.

Remove columns

To remove a column, select the column heading that you want to remove, and under **Common Tasks**, click **Remove**, and then in the confirmation message, click **OK**.

4. Click **OK**, and then click **Export**.
5. View the file containing the dynamic worksheet:
   a. To view the worksheet, click **Open**.
   b. If you are using Microsoft Office Excel 2007:
      - You will see a message that says the file that you are trying to open is in a different format than specified by the file extension. Click **Yes**.
      - If you see the security warning **Data connections have been disabled**, click **Options**, click **Enable this content**, and then click **OK**.

      If you are using Microsoft Excel 2010:
      - You will see a message that says the file that you are trying to open is in a different format than specified by the file extension. Click **Yes**.
      - You will see a message that says that the file was opened from a potentially unsafe location. Click **Enable Editing**.
      - If you see the security warning **Data connections have been disabled**, click **Enable Content**, and then click **OK**.
6. To refresh data in the file, on the **Data** tab in the **Connections** group, click **Refresh All**.
7. To save the exported data to a file, in Excel, on the **File** menu, click **Save**.

   Each time you open the file, if you have the Microsoft Dynamics CRM for Outlook installed, you will have the option to refresh data from Microsoft Dynamics CRM.

Tips

- If you export a list to a dynamic worksheet or PivotTable that you think will be useful to other Microsoft Dynamics CRM users, you can add the list as a report, and then share it with others or make it available to all Microsoft Dynamics CRM users.

- If the recipients are in the same domain as you, and are Microsoft Dynamics CRM users, you can e-mail a dynamic Excel file, or store it as a shared file. When recipients open the dynamic file, they will see data they have permission to view in Microsoft Dynamics CRM, so the data they see may be different from what you see.

Notes

- In Microsoft Dynamics CRM, money values are exported to Microsoft Office Excel as numbers. After you have completed the export, to format the data as currency, see the Excel Help topic titled “Display numbers as currency.”
- Some system views, such as Accounts: No Campaign Activities in Last 3 Months, can be exported only to a static Excel worksheet.

Related Topics

Export Data to Excel 61
Create Customer-Ready Documents and Messages 164
Write a Report Using Report-Writing Tools 112
Running Reports and Analyzing Data 95

Avoiding Duplicate Records

To determine whether a record is a potential duplicate, Microsoft Dynamics CRM uses duplicate detection rules. When publishing a duplicate detection rule, a matchcode is created for each existing record. Every five minutes, a matchcode is created for any records that have been added or updated. When a record is in the process of being created or updated, its matchcode can be checked automatically against the matchcodes of existing records.

By default, Microsoft Dynamics CRM has simple duplicate detection rules set up for accounts, contacts, and leads that are based upon records with the same e-mail address. More information: Work with duplicate detection rules

Important
After publishing a duplicate detection rule, increasing the length of fields that are included in the duplicate detection criteria go undetected. The field length could exceed the matchcode length limit and not be verified. This could result in duplicates not being detected.

A System Administrator or System Customizer makes duplicate detection available. They also define and publish duplicate detection rules that make sense for your organization. More information: *Enable and Disable Duplicate Detection* (on page 70)

By default, duplicate detection is available:

- When a record is created or updated. This includes when a record created with the Microsoft Dynamics CRM for Outlook is tracked in Microsoft Dynamics CRM.

  CRM prompts users before saving or importing potential duplicate records.

Note
Duplicates cannot be detected when a user merges two records, converts a lead, or saves an activity as completed.

- When the Microsoft Dynamics CRM for Outlook goes from offline to online.

  By default, duplicates are not detected during synchronization. More information: Synchronize Data

- During data import.

  Each time you define an import, the choice of checking for duplicates is available. More information: Work with Imports

It still is possible to create duplicate records. So, you can schedule duplicate detection jobs. A duplicate detection job runs in the background while you do other things on Microsoft Dynamics CRM. You can request e-mail notification from CRM upon the completion of duplicate detection job. This informs you when you can review the results.

Enable and Disable Duplicate Detection

Can I do this task?

This task requires the System Administrator or System Customizer security role or equivalent permissions. More information about specific permissions and performing this task while offline: Configuration Permissions

Duplicate detection can take place only if duplicate detection is enabled in **Duplicate Detection Settings** and if at least one duplicate-detection rule exists for the record type.

1. In the Navigation Pane, click **Settings**, click **Data Management**, and then click **Duplicate Detection Settings**.
2. Select whether duplicate detection should be enabled.

   Typically, most organizations use duplicate detection in as many scenarios as possible to ensure that records are not duplicated. However, if your system has a large number of records, checking for duplicates can hurt performance.
3. Review the parts of Microsoft Dynamics CRM where duplicate detection can occur, and modify the settings as needed:

   - **When a record is created or updated**

     Users will be prompted automatically before saving or importing potential duplicate records of any record type for which a published duplicate-detection rule exists.

   Note
   Duplicates cannot be detected when a user merges two records, converts a lead, or saves an activity as completed.

   - **When Microsoft Dynamics CRM for Outlook goes from offline to online**

     All users of Microsoft Dynamics CRM for Outlook must select how they want duplicate detection to work when they synchronize data. By default, duplicates are not detected when Microsoft Dynamics CRM for Outlook synchronizes records. More information: Synchronize Data

- **During data import**

  Each time users define a data import job, the choice of whether to check for duplicates is available. More information: Work with Imports

4. Click **OK**.

Tip

To remove duplicate-detection for one record type:

1. In the Navigation Pane, click **Settings**, click **Customizations**, and then click **Customize the System**.
2. Double-click the record type.
3. In the **Duplicate Detection** section, clear the **Enable Duplicate Detection** check box.
4. Click **Save and Close**.
5. When your customizations are complete, publish your customizations:
   - To publish customizations for the entity you are currently editing, on the **Actions** menu, click **Publish**.
   - To publish customizations for all entities at once, open the **Customize the System** list. On the **Actions** menu, click **Publish All Customizations**.
   - To publish customizations for specific entities, open the **Customize the System** list and select the entities you want to publish. On the Actions toolbar, click **Publish**.

Related Topics

Check for duplicates .....
Avoiding Duplicate Records .....

Create or edit a duplicate-detection rule

Can I do this task?

This task requires a manager, vice president, CEO-Business Manager, System Administrator, or System Customizer security role or equivalent permissions. More information about specific permissions and performing this task while offline: Configuration Permissions

Microsoft Dynamics CRM includes default duplicate-detection rules for accounts, contacts, and leads. No default rules are provided for other record types.

1. In the Navigation Pane, click **Settings**, click **Data Management**, and then click **Duplicate Detection Rules**.
2. To create a new duplicate-detection rule, click **New**. Type a name and description.

   - OR -

To edit an unpublished existing duplicate-detection rule, double-click the duplicate-detection rule.

- OR -

To edit a published duplicate-detection rule, select the duplicate-detection rule, on the **Actions** menu, click **Unpublish**, and then double-click the duplicate-detection rule.

3. Select the criteria to be used to identify a record as a duplicate.
   a. If you are creating a new rule:
      - In the **Duplicate Detection Rule Criteria** section, in the **Base Record Type** list, click the type of record that this rule applies to.
      - In the **Matching Record Type** box, click the type of record that this rule applies to.
   b. If you want the rule to be case-sensitive, select the **Case-sensitive** check box.
   c. If you selected different record types for the base and matching record types, for each new criteria:
      1. In the **Base Record Field** column, click **Select**, and then click an attribute.
      2. In the same row, in the **Matching Record Field** column, click **Select**, and then click an attribute.
      3. In the same row, in the **Criteria** column, click **Select**, and then click an operator.
      4. If you specified **Same First Characters** or **Same Last Characters**, in the **No. of Characters** column, click **Enter Value**, and then enter the number of characters to compare.

         Note

         If you are unable to see the **No. of Characters** column, scroll the to the right of the dialog box.
   d. If you selected the same record types for the base and matching record types, for each new criteria:
      1. In the **Attribute** column, click **Select**, and then click a field.
      2. In the same row, in the **Criteria** column, click **Select**, and then click an operator.
      3. If you specified **Same First Characters** or **Same Last Characters**, in the **No. of Characters** column, click **Enter Value**, and then enter the number of characters to compare.

   The number of criteria that you can select is limited by the number of characters that can be stored in the matchcode for the record. As you add criteria, watch the **Current matchcode length** value shown at the bottom-left of the Duplicate Detection Rule area.
4. Click **Save and Close**.
5. To make the new or changed duplicate-detection rule usable, publish it.
   - If there is no **Publish** button on the Actions toolbar, ask someone with the System Customizer or System Administrator security role to publish the rule.
   - If there is a **Publish** button, select the new or changed rule, and then click **Publish**.

   When you publish a duplicate-detection rule, a matchcode is created for every record in the matching record type for that rule. Publishing occurs in the background as a system job.

   Important
   Microsoft Dynamics CRM sets the value for any empty fields in a record to "NULL." When you create a duplicate-detection rule with multiple criteria, Microsoft Dynamics CRM sets the value for any

criteria that does not have a specified value to "NULL." During the duplicate-detection job, Microsoft Dynamics CRM shows all records with the value set to "NULL" as potential duplicates. To avoid the false potential duplicates, if you are creating a duplicate detection rule with multiple criteria, make sure that you specify a value for all the criteria.

Note

- We recommend that you set the duplicate-detection criteria on a field that has unique values. For example, E-mail.
- You can have more than one duplicate-detection rule for each record type.

Related Topics

Check for duplicates 47

Avoiding Duplicate Records..... 69

Publish or unpublish a duplicate-detection rule

Can I do this task?

This task requires the System Administrator or System Customizer security role or equivalent permissions. More information about specific permissions and performing this task while offline: Configuration Permissions

When you publish a duplicate-detection rule, a matchcode is created for every record in the matching record type for that rule. Publishing occurs in the background as a system job.

1. In the Navigation Pane, click **Settings**, click **Data Management**, and then click **Duplicate Detection Rules**.
2. Select any duplicate-detection rules that you want to publish, and then on the Actions toolbar, click **Publish**, and then click **OK**.
3. To monitor the status of the duplicate-detection publishing system job, look at the value of the **Status Reason** column. For more detailed status information, open the duplicate-detection rule, and then under **Related**, click **System Jobs**.

   Use the commands on the **Actions** menu to cancel, resume, postpone, or pause the system job.

   Note
   To unpublish a rule, select the rule, and then on the **Actions** menu, click **Unpublish**.

Related Topics

Avoiding Duplicate Records 69

Check for duplicates 47

Check for duplicates

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

Duplicate detection can take place only if duplicate detection is enabled in **Duplicate Detection Settings** and if at least one duplicate-detection rule exists for the record type.

1. Start duplicate detection.

   Start duplicate detection from any list of records, including results of an Advanced Find search

   a. In any list, on the **Actions** menu, click **Detect Duplicates**.

   b. To search selected records, click **For Selected Records**.

      - OR -

      To search all records on all pages of the current view, click **For All Records on All Pages**.

      Start duplicate detection from the Workplace, Tools menu, or Settings area

   c. On the **Tools** menu, click **Duplicate Detection**.

      - OR -

      In the **Workplace**, in the **My Work** section, click **Duplicate Detection**, and then click **New**.

      - OR -

      In the Navigation Pane, click **Settings**, click **Data Management**, click **Duplicate Detection Jobs**, and then click **New**.

   d. Click **Next**.

   e. In the **Look for** list, click a record type.

      The **Look for** list includes only record types that have published duplicate-detection rules. More information: Work with Duplicate-detection Rules

   f. Select criteria to define the records that Microsoft Dynamics CRM will use to check for duplicates:

   - To use criteria from a saved view:

     In the **Use Saved View** list, click a view from the System Views or My Views section.

     - OR -

   - To use new criteria:

     For each criteria to use in the search, click an item in the **Select** list. More information: Work with Advanced Find

   Tips

   - To make sure that you have the records you want, click **Preview Records**.
   - To change the columns that are displayed in the preview, or the column order, sort order, or column widths, click **Edit Columns**.

- To save these criteria to use later, click **Save As**. This saved view will be available in the **My Views** section of the **View** box.

g. Click **Next**.

2. Specify:
   - The name of the duplicate-detection job.
   - When you want the duplicate-detection job to start. You also can specify to run the job on a regular schedule.
   - Whether you want notification sent to you and to other users when the background duplicate-detection job completes.
3. Click **Next**, and then click **Submit**.

   The duplicate detection job processes in the background. If you requested notification, you will receive an e-mail notification when the job completes, with a link to the page where you can resolve duplicates.
4. To view the potential duplicates, after the duplicate-detection job completes, in **Workplace**, under **My Work**, click **Duplicate Detection**.
5. Open your duplicate-detection job.
6. Under **Related**, click **View Duplicates**.

   The top list displays all records that have potential duplicates. When you select a record in the top list, the bottom list shows all the potential duplicates for that record.
7. In the top list of records that may have duplicates, select a record.
8. In the list of potential duplicate records, for each potential duplicate record found, select the record, and then do any of the following actions:

Action	**Do this**
View the contents of a record to help you decide what to do	Double-click the record.
Edit the record	On the **Actions** menu, click **Edit**.
Deactivate the record	a. On the **Actions** menu, click **Deactivate**. b. In the confirmation dialog box, click **OK**.
Merge record by using the record in the top list as the master	a. In the **Records** group, click **Merge**. b. Click **Automatically**.

Merge record by choosing the master record	a. In the **Records** group, click **Merge**. b. Click **Select Master**. c. In the **Merge Records** dialog box, select which record to make the new master record. d. Select the fields from each record that you want to include in the master record. Fields that are shaded will overwrite the corresponding unshaded field during the merge operation. e. When you are ready to merge the two records, click **OK**. f. When you receive the message **The selected records are merged and the subordinate record is deactivated**, click **OK**.
Delete the record	a. On the Actions toolbar, click the **Delete** button . b. In the **Select Delete or Deactivate** dialog box, click **Delete**, and then in the confirmation dialog box, click **OK**.

9. When you have finished resolving duplicates, click **Close**.

Notes

- Your system administrator or system customizer determines the criteria for identifying a record as a potential duplicate. More information: *Requesting User Interface Changes* (on page 220)
- If you enter a duplicate record within a few minutes of entering the first record, Microsoft Dynamics CRM will not detect the duplicate record. The matchcodes for new and updated records are created every five minutes, rather than as a record is created.
- To refresh the list of duplicate records, you must run a new duplicate-detection job:
  - After a record has been merged or deactivated, the record is still displayed on the bottom list.
  - You can use the **Modified On** column to determine whether a record was modified after the duplicate-detection job was run.

- After a record has been deleted, merged or deactivated, the record is still displayed on the top list.

Related Topics

Enable and Disable Duplicate Detection 70
Avoiding Duplicate Records 69

Resolve potential duplicate records - Procedure

1. To view the potential duplicates, after the duplicate-detection job completes, in **Workplace**, under **My Work**, click **Duplicate Detection**.
2. Open your duplicate-detection job.

3. Under **Related**, click **View Duplicates**.

   The top list displays all records that have potential duplicates. When you select a record in the top list, the bottom list shows all the potential duplicates for that record.

4. In the top list of records that may have duplicates, select a record.

5. In the list of potential duplicate records, for each potential duplicate record found, select the record, and then do any of the following actions:

Action	**Do this**
View the contents of a record to help you decide what to do	Double-click the record.
Edit the record	On the **Actions** menu, click **Edit**.
Deactivate the record	a. On the **Actions** menu, click **Deactivate**. b. In the confirmation dialog box, click **OK**.
Merge record by using the record in the top list as the master	a. In the **Records** group, click **Merge**. b. Click **Automatically**.
Merge record by choosing the master record	a. In the **Records** group, click **Merge**. b. Click **Select Master**. c. In the **Merge Records** dialog box, select which record to make the new master record. d. Select the fields from each record that you want to include in the master record. Fields that are shaded will overwrite the corresponding unshaded field during the merge operation. e. When you are ready to merge the two records, click **OK**. f. When you receive the message **The selected records are merged and the subordinate record is deactivated**, click **OK**.
Delete the record	a. On the Actions toolbar, click the **Delete** button . b. In the **Select Delete or Deactivate** dialog box, click **Delete**, and then in the confirmation dialog box, click **OK**.

6. When you have finished resolving duplicates, click **Close**.

Importing Data

Microsoft Dynamics CRM provides several tools for assist you to import bulk data:

- Import Data Wizard
- Add Contacts Wizard

Microsoft Dynamics CRM Software Development Kit http://go.microsoft.com/fwlink/?LinkId=191610 To automate the import process, use the SDK to write a custom import tool.

Importing Your Data Using the Import Data Wizard

The Import Data Wizard is useful for importing data you have stored in a spreadsheet or importing leads that you have purchased. It can be used for importing data into most record types. The Import Data Wizard is designed for people in sales, marketing, and customer service to use with their own data. All imported data will be owned by the user who does the import, or, if the user has permission to create records, all records in an import can be assigned to another user. The Import Data Wizard can also import:

- Multiple files containing related record types, such as accounts with related contacts.
- Records that need to be assigned to different Microsoft Dynamics CRM users.
- Notes and attachments.

The data must be in a comma-separated value (.csv) file, any other type of delimited text (.txt) file, an XML Spreadsheet 2003 file, or a compressed (.zip) file. You can export or save data in comma-separated format from many applications, such as Microsoft Office Excel, Microsoft Office Outlook contacts, and most databases. If your import file uses column headings that match Microsoft Dynamics CRM display names, the file automatically maps. If you frequently import data that is in the same format, to save time you can create and use a data map for your source that maps your data.

Microsoft Dynamics CRM processes imports in the background. After an import completes, you can review which records succeeded or failed to import. To fix the records that failed to import, export them into a separate file, fix them, and then try to import them again. You can delete all records associated with an import.

If your System Administrator or System Customizer has enabled duplicate detection during import, you can select whether to import potential duplicates. Also, after completing an import job, you can run a duplicate-detection job to detect any potential duplicates.

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

Follow the guidelines in this topic to make sure that your file imports successfully.

1. Put records for each record type in a separate file. More information: Exporting data to delimited text files.

   Note

   If your exported source file contains data for contacts and accounts, use the **Generic Map for Contact and Account** data map. This is one of the default data maps provided with the Import Data Wizard.

   If your source file contains records for two record types other than contacts and accounts, make a copy of the **Generic Map for Contact and Account** data map to customize for the records types in your source file. Import the customized data map into Microsoft Dynamics CRM, and use this data map to import your data. For more information, see Work with Data Maps.

2. Make sure that the file is in one of the following formats:

   - Delimited text (.txt) format, with columns separated by commas

- Comma-separated value (CSV) file (.csv) format
- XML Spreadsheet 2003 (XMLSS) file (.xml) format
- Compressed file in a .zip format

A .zip file can include files using the .csv, .xml, or .txt formats. All files in a single compressed file must be of the same format.

3. Make sure that each file is correctly delimited.

   You can create delimited a file in the .txt, .csv, or .xml format by using Microsoft Office Excel.

   If your file uses only ASCII characters, save the file as a comma-delimited values (.csv) file.

4. In Excel 2007, click the **Microsoft Office Button** , and then click **Save As**.

   - OR -

   In Excel 2010, click the **File** tab, and then click **Save As**.

5. In the **Save as type** list, click **CSV (Comma delimited (*.csv)**.

   If your file uses non-ASCII characters, save the file as a Unicode text (.txt) file.

   If your import file contains non-ASCII characters, the import file must be in a Unicode or UTF-8 format.

   a. In Excel, click **Save As**, and select **Unicode text (*.txt)**.

   b. Use Notepad to open the .txt file.

   c. Search for commas in the file. Enclose any data that includes commas with double-quotes. For example:

      "23 State Street, Apt 2".

   d. Replace all **tab** characters with commas.

      1. In Notepad, select the **tab** character with the keyboard or mouse and press CTRL+C to copy it to the Clipboard.
      2. On the **Edit** menu, click **Replace**.
      3. In the **Find what** box, press CTRL+V to paste the Clipboard contents. This pastes the **tab** character.
      4. In the **Replace with** box, type a comma (,).
      5. Click **Replace All**.
      6. Click **Save As**.
      7. In the **Save as type** box, select **Text Documents (*.txt)**, and in the **Encoding** box, select **Unicode**.

6. Make sure you complete the preparation tasks for specific record types.
7. Make sure you complete the preparation tasks for specific data types.

If you want to transform data as part of the import process, identify whether the provided transformations can do the required changes. If not, decide if you need to edit your source data before importing it. For more information, see Transformation Reference.

8. Make sure the first line of a file is the column headings.

Edit your file and add column headings if they are not already present.

Note

Make sure that the .csv file does not contain:

- Multiple lines in the first line (header row).
- Quotation marks in the first line. In Microsoft Dynamics CRM, quotation marks are used as data delimiters.
- Data separated with a semicolon (;) or comma (,). In Microsoft Dynamics CRM, semicolons and commas are used as field delimiters.

Important

To use automatic mapping, which is required for importing data that contains references to existing Microsoft Dynamics CRM records, column headings must match attribute display name values in Microsoft Dynamics CRM.

- To identify display name values, open the form for the record type as if you were creating a new record. The labels on the form typically match the display names, although it is possible for your system customizer to have changed the form label values. If you have the appropriate security role, you identify display names in the Customization area:
  1. In the Navigation Pane, click **Settings**, click **Customizations**, and then click **Customize the System**.
  2. Open the entity, and then click **Attributes**.
- If you are working in a multi-language environment, automatic mapping of columns uses the display names from the user interface language, set on the **Regional Options** tab of the **Set Personal Options** dialog box. More information: *Set Personal Options* (on page 201)

1. Make sure data exists for all business-required fields.

   A record will only import if all Microsoft Dynamics CRM business-required attributes are mapped, and if the data exists in each of the source columns that are mapped to the required attributes. You can either determine the required attributes in advance, or use the Import Data Wizard to identify missing required mappings. In either case, make sure you have required data in each record. To determine which fields are business-required, open the form for the record type as if you were creating a new record, and identify fields that are marked with a red asterisk (*).

   The following list shows default business-required fields for commonly imported record types.

   - Account: **Account Name**
   - Contact: **Last Name**
   - Lead: **Topic**, **Last Name**, **Company Name**

   Product: **Default Unit**, **Unit Group**, **Decimals Supported** Campaign Response: **Parent Campaign**, **Subject**, **Owner** Example showing sample leads to import.

The following lines show what the data might look like for a .csv format file containing leads to import. The first line contains the field names, and the remaining lines are imported as data.

```
Company,Last Name,First Name,Topic,Email,Mobile Phone

Designer Bikes,Groth,Brian,Mountain bikes,someone@example.com,555-555-0112

Major Sporting Goods,Bedecs,Anna,Components,,555-555-0171
```

Note

By default, the maximum size of the files that you can import is 8 megabytes (MB). This means:

- Any .csv, .txt, or .xml file must not exceed 8 MB in size.
- The total size of the .zip file with the attachment folder cannot exceed 32 MB.

  The total size of the extracted files must not exceed 200 MB.

Related Topics

Importing Data 77

If your file uses only ASCII characters, save the file as a comma-delimited values (.csv) file.

1. In Excel 2007, click the **Microsoft Office Button** , and then click **Save As**.

   - OR -

   In Excel 2010, click the **File** tab, and then click **Save As**.
2. In the **Save as type** list, click **CSV (Comma delimited (*.csv)**.

If your file uses non-ASCII characters, save the file as a Unicode text (.txt) file.

If your import file contains non-ASCII characters, the import file must be in a Unicode or UTF-8 format.

1. In Excel 2007, click the **Microsoft Office Button** , and then click **Save As**.

   - OR -

   In Excel 2010, click the **File** tab, and then click **Save As**.
2. In the **Save as type** list, click **Unicode text (*.txt)**.
3. Use Notepad to open the .txt file.

   8. Search for commas in the file. Enclose any data that includes commas with quotation marks. For example, if you have *23 State Street, Apt 2*, change it to *"23 State Street, Apt 2"* in the file.

Make sure the first line of the file contains column headings.

Edit your file and add column headings if they are not already present.

Note

Make sure that the .csv file does not contain:

- Multiple lines in the first line (header row).
- Quotation marks in the first line. In Microsoft Dynamics CRM, quotation marks are used as data delimiters.
- Data separated with a semicolon (;) or comma (,). In Microsoft Dynamics CRM, semicolons and commas are used as field delimiters.

Important

To use automatic mapping, which is required for importing data that contains references to existing Microsoft Dynamics CRM records, column headings must match field display name values in Microsoft Dynamics CRM.

- To identify display name values, open the form for the record type as if you were creating a new record. The labels on the form typically match the display names, although it is possible for your system customizer to have changed the form label values. If you have the appropriate security role, you identify display names in the Customization area:
  1. In the Navigation Pane, click **Settings**, click **Customizations**, and then click **Customize the System**.
  2. Open the entity, and then click **Fields**.
- If you are working in a multi-language environment, automatic mapping of columns uses the display names from the user interface language, set on the **Regional Options** tab of the **Set Personal Options** dialog box. More information: *Set Personal Options* (on page 201)

Make sure the first column heading is not the name of a record type.

The first column heading in your file cannot be the name of another record type. For example, phone call, task, letter, fax, and appointment records all require a Subject column. As Subject is also the name of a record type, the Subject column must not be the first column in your file.

Make sure data exists for all business-required fields.

A record will only import if all Microsoft Dynamics CRM business-required fields are mapped, and if the data exists in each of the source columns that are mapped to the required fields. You can either determine the required fields in advance, or use the Import Data Wizard to identify missing required mappings. In either case, make sure you have required data in each record. To determine which fields are business-required, open the form for the record type as if you were creating a new record, and identify fields that are marked with a red asterisk (*).

The following list shows default business-required fields for commonly imported record types.

- Account: **Account Name**
- Contact: **Last Name**

- Lead: **Topic**, **Last Name**, **Company Name**
- Product: **Default Unit**, **Unit Group**, **Decimals Supported**
- Campaign Response: **Parent Campaign**, **Subject**, **Owner**

Important

You cannot use a data map to import data if your data is connected to existing Microsoft Dynamics CRM records. You must use automatic mapping, which means your column headings must match Microsoft Dynamics CRM display names.

- The value in the column that refers to another record must be unique in the primary attribute for the related record. The lookup is not case-sensitive.

  For example, if you are importing a contact that you want associated with an existing account, you must have a column in your source file containing the account name for an existing Microsoft Dynamics CRM account record. Because automatic mapping is required, the column heading for this column must be **Parent Customer**.

  The **Parent Customer** attribute can be resolved either to an account or contact. The Import Data Wizard looks for a unique account or contact record. If there is a contact record and an account record that have identical values in the **Account Name** field in the account record and the **Full Name** field in the contact record, the record will not be imported.
- The value in the column can also be a Microsoft Dynamics CRM globally unique identifier (GUID).
- If the column in your source file that is used to create the relationship contains multiple values, edit the data to contain just one value.

  For example, if you are importing e-mail activities, and your source data has a record with multiple values in the **To** column, edit the data to contain just one value.

Decide how to import drop-down list values in the file.

If you have data in columns that will be imported to drop-down lists in Microsoft Dynamics CRM, review the data in these columns. If the values do not match valid values in Microsoft Dynamics CRM, you will need to perform one of the following procedures:

- Use a data map to map each value in your source file to a valid value in Microsoft Dynamics CRM.
- Do a find-and-replace in your source file and then replace each value that isn't valid in Microsoft Dynamics CRM, with one that is. This avoids the need to do list-value mapping in the data map.
- Customize the drop-down list attribute in Microsoft Dynamics CRM by adding each unique value in your source file. This task requires privileges usually reserved for the System Administrator or System Customizer security role.

Make sure that values have consistent capitalization.

Example showing sample leads to import

The following lines show what the data might look like for a .csv format file containing leads to import. The first line contains the field names, and the remaining lines are imported as data.

```
Company,Last Name,First Name,Topic,Email,Mobile Phone
```

```
Designer Bikes,Groth,Brian,Mountain bikes,someone@example.com,555-555-0112

Major Sporting Goods,Bedecs,Anna,Components,,555-555-0171
```

Example showing sample products to import

The following lines show the minimum amount of data required for a .csv format file containing products to import. The first line contains the field names, and the remaining lines are imported as data. Because Unit Group and Default Unit are record types in Microsoft Dynamics CRM, the values for these columns must map to valid values in Microsoft Dynamics CRM.

```
Product,Unit Group,Default Unit,Decimals Supported

Front Brakes,Single pair,Unit pair,0

Vest,Clothing,Single article,2
```

Import records from a file

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

To make sure that the import is successful, be sure to follow the steps in *Prepare a file for import* (see " " on page 78).

1. On the **File** tab, click **Tools**, and then click **Import Data**.

   The Import Data Wizard opens.

2. Click **Browse** to upload a file.

   Upload a file

   a. To locate a file that you want to import, click **Browse**.

      Microsoft Dynamics CRM supports importing data from the following file types:

      - XML Spreadsheet 2003 (.xml)–Microsoft Excel format stored as an XML file. You can open the XML spreadsheets with Microsoft Excel.
      - Comma-separated values (.csv)–Comma-delimited format.
      - Text (.txt)–Delimited text format with columns separated by commas.
      - Compressed files (.zip)–Compressed file that contains one or more files of the same supported file type (.xml, .csv, or .txt).

   b. Click **Next**.

      Note

      By default, the maximum size of the files that you can import is 8 megabytes (MB). This means:

      - Any .csv, .txt, or .xml file must not exceed 8 MB in size.

- The total size of the .zip file with the attachment folder cannot exceed 32 MB.
- The total size of the extracted files must not exceed 200 MB.

Important

When the **Import Data Wizard** extracts .zip files, extracted files are placed on the computer for a while. During this time, the local administrator of the computer may access the extracted files and may view the data in these files.

3. Review the file that you have uploaded. If you imported a .zip file, the review also includes a list of all of the files contained in the .zip file.
4. To change delimiters, click **Delimiter Settings** on the **Review File Upload Summary** page. This displays the delimiters settings. In the **Field Delimiter** list, click the field delimiter used in the uploaded data file. In the **Data Delimiter** list, click the data delimiter used in the uploaded data file.

   The default field delimiter is a comma (,). Other field delimiters in the list include the colon (:), semicolon (;), and tab character (\t).

   The default data delimiter is a quotation mark ("). Other data delimiters in the list include the single quotation mark (') and **None**.

   Note

   When importing a .zip file, all files contained in the .zip file must use the same field and data delimiters.
5. If the first row in your file contains column headings, select the **First row contains column headings** check box.
6. Click **Next**.
7. Select a data map in order to map your source data to Microsoft Dynamics CRM record types and fields.
   - Select **Map Automatically** to allow the Import Data Wizard to automatically map the source data with Microsoft Dynamics CRM record types and fields. The Import Data Wizard tries to identify the matching Microsoft Dynamics CRM record type and fields by comparing their display names with the files you have uploaded for import and their column names. If the Import Data Wizard is not able to map any entity or field, it will show the mapping pages so that you can manually map the unmapped record types or fields.
   - Select **Use an Existing Data Map:** and select a data map to use for the mappings.

     The existing data map list includes all the maps that you may have imported or created at the time of mapping the files manually. By default, Microsoft Dynamics CRM provides a data map for Salesforce.com.

     - Select **For Full Data Export** if you obtained your data from Salesforce.com using the Full-Data Export.
     - This is selected by default if you have uploaded a .zip file.
     - Select **For Report Export** if you have obtained your data from Salesforce.com using the Report Export.
     - For more information about exporting data from Salesforce.com, see Work with Salesforce.com Data.

- Select any other maps under **Custom Maps** if you already have the mappings defined for the type of data you are importing.

Note
If a map for your source system isn't listed in the Import Data Wizard, check the Resource Center to see if one is available. If not, you can export a data map to edit it manually and import it back. Or, you can also save your mappings during an import session as a new data map.

8. Click **Next**.

   If your data does not map automatically, you will be asked to manually map the source data to Microsoft Dynamics CRM record types and fields.

9. Map the unmapped source files to Microsoft Dynamics CRM record types.

   A green check mark appears for each source file that is successfully mapped to a Microsoft Dynamics CRM record type. An alert symbol appears for each source data file that could not be mapped to a record type in Microsoft Dynamics CRM automatically.

   a. For each unmapped source data file, click the name under **Microsoft Dynamics CRM Record Types**, and then click the record type to which it maps in the list.

      - OR -

      If no Microsoft Dynamics CRM record type in the list is appropriate for the data in your source file, create a custom record type clicking **Create New** in the list.

      Create a custom record type

      1. Click **Create New**.
      2. Enter the following information:
         - **Record Type Name**. Specify the name for the record type in Microsoft Dynamics CRM. By default, the file name displays here.

         Note

         If the name that you specified already exists, Microsoft Dynamics CRM prompts you to specify a new name.

         - **Plural Name of the Record Type**. Specify the plural name for Microsoft Dynamics CRM to use for this record type.
         - **Primary Field**. Specify the name of the column that should be used as the primary field for the record type.

           The primary field displays when creating or displaying relationships to this record type, such as in the **Look Up Records** dialog box.

         Note

         You can create a new record type only if you have the privileges to create and publish custom record types in Microsoft Dynamics CRM.

      3. Click **OK**.

      - OR -

If you want to skip importing a file, click **Ignore** in the list for that file.

The **Import Data Wizard** will not import data from a file that is ignored.

b. Click **Next** when each file is either mapped or ignored.

10. Map the unmapped source columns to Microsoft Dynamics CRM fields.

The left pane on the **Map Fields** page shows the record types to which you have mapped your source data files. The right pane contains two columns: **Source Fields** and **CRM Fields**. For each Microsoft Dynamics CRM record type that has an alert symbol, the **Source Fields** column shows the various column headings in your source file. The corresponding boxes in the **CRM Fields** column contain the Microsoft Dynamics CRM fields for the record type.

a. For each record type in the left pane that has an alert symbol, click the record type name. Then, in the right pane:

1. Map Microsoft Dynamics CRM required fields to source columns:

- Select a column from your source file that matches the field.
- Select **Ignore** to allow the **Import Data Wizard** to populate the field by default.

Important

Microsoft Dynamics CRM populates some fields by default, shown as **Ignore**, and you do not need to map these fields to continue with your import.

2. Map source column to optional fields:

- If you want to map the unmapped columns, select the Microsoft Dynamics CRM field to which it maps.
- If no existing Microsoft Dynamics CRM field is appropriate for the data in the column and you want to create a new custom Microsoft Dynamics CRM field, create a new field.

To create a new field

For each unmapped column, under **Actions**, click **Create New Field** from the corresponding list.

In the **Field Name** box, type a name for the new field.

If a field with the name that you specified already exists in Microsoft Dynamics CRM, you will be prompted to specify a new name.

In **Type**, click the type for the field you want to create in Microsoft Dynamics CRM. The available items in the list are **Text**, **Picklist**, **Bit**, **Integer**, **Decimal**, **Datetime**, and **Lookup**.

Create a field of the lookup type

If a record is related to another record, that record has a field that points to a field in the related record. The field that points to another field is called a lookup field.

Specify the following details for the new field:

Related Record Types. Select a record type that contains the field that the new field should reference in order to search for the record.

Referred Field. Select an existing Microsoft Dynamics CRM field that the new field should reference in order to search for the record.

Create a field of the option set type

If you clicked **Option Set** from the list for **Type**, click a value from the **CRM Option Values** list for each column of the source file.

By default, Microsoft Dynamics CRM adds every value in a column from the source file to the **CRM Option Values** list, and maps that value automatically. Microsoft Dynamics CRM creates these values in the **CRM Option Values** list during the import. If you do not want to include a particular value from the source file in Microsoft Dynamics CRM, click **Ignore** in the **CRM Option Values** list next to that value from the source file.

For example, a source file contains the column "Rating" containing three values: "Hot," "Warm," "Cold." You want to create a custom field in Microsoft Dynamics CRM for the Rating column including only "Hot" and "Warm" while excluding "Cold." Click "Hot" and "Warm" in the **CRM Option Values** list. For "Cold," click **Ignore**. The completed import only includes the values "Hot" and "Warm" for the Rating field in Microsoft Dynamics CRM.

Click **OK**.

Tip

You can filter the source fields using the filter list. You can choose to show all fields, show only unmapped fields, or show only mapped fields.

Important

You can create new fields only if the target record type for which you are creating this field is customizable and if you have the sufficient privileges. More information: Customize and publish during import in *Permissions required for customization tasks*.

Note

If you create new custom fields for an existing record type or for a new record type that is created during the import, the fields are created and published, and the imported data is added into these fields. However, these fields are not added to the record type form automatically.

You will not see data imported into these fields on the record type form. If you want to see the data on the record type form, after the import is complete, you must navigate to Customizations and add the fields created during the import to their respective record type forms.

If you want to skip importing data from this column, click **Ignore**.

You will see a yellow warning message icon for all the columns that are not mapped.

Important

If a field used in a data map for mapping data is no longer available in Microsoft Dynamics CRM, an error is displayed. You will not be allowed to continue until you either map the source column to a different field or ignore the column.

b. Click **Next** when you have mapped each column from the source file to a Microsoft Dynamics CRM field or have have clicked **Ignore** in its list under **CRM Fields**.

The **Review Mapping Summary** page shows a summary of the mapped files that will be imported.

Tip

Click **Edit** if you want to edit the mappings.

11. Click **Next**.
12. Review the import settings.
    a. Select whether you want the **Import Data Wizard** to allow importing duplicate records in Microsoft Dynamics CRM.
    b. In **Select Owner for the Imported Records**, click the **Lookup** button to select an owner who will own the records if the owner mappings are not defined in the data map or the users.csv.

    Important

    Usually, owners are mapped or created using the owner information in the users.csv file. If the source data does not contain a users.csv file, the records are still imported with the owner as the user you specify in **Select Owner for the Imported Records**. For more information, see How User Records Are Imported.

    c. In **Data Map Name**, specify a name for the data map.

    This data map can be used later for importing data from similar sources.
13. Click **Submit**.

Note

To view the status of your import, click the **Imports** link. Microsoft Dynamics CRM always displays the success and error counts for an import file used to import user records as "0" for the Imports list. Other files types may display other values for the Imports list.

14. Click **Finish**.

Important

Because more than one user can submit import jobs at once, the import requests for files that are larger than 1 MB are queued and processed one at a time. For example, if three users each submit a .zip file that is larger than 1 MB, then the first file import starts immediately and queues the other two. When finishing the first import task, Microsoft Dynamics CRM imports the second and third in the order that they were submitted. Meanwhile, any small file (.zip, .csv, .txt, or .xml) submitted for import might be imported immediately, depending on the asynchronous service.

Related Topics

Importing Data 77

Enrich data in existing records

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

You can export existing records, add or change data in the exported records, and then import only those records with changes.

1. Use Advanced Find to select the records that you want to update and the columns to export.

   Edit the search query results to add all the columns to the search results list you need to enrich the data. This includes:

   - Any columns that you plan to enrich. For example, if you used Advanced Find to identify all leads missing a business phone number, add the Business Phone column.

     All business-required fields. To determine which fields are business-required, open the form for the record type as if you were creating a new record, and identify fields that are marked with a red asterisk (*).

     The following list shows default business-required fields for commonly imported record types.

   - Account: **Account Name**
   - Contact: **Last Name**
   - Lead: **Topic**, **Last Name**, **Company Name**
   - Product: **Default Unit**, **Unit Group**, **Decimals Supported**
   - Campaign Response: **Parent Campaign**, **Subject**, **Owner**

     More information: Work with Advanced Find

   To avoid problems when re-importing data, either do not export the following types of columns, or delete these columns after you have enriched data in other columns.

   - Columns **from other record types. Although you can use Advanced Find to export data from related record types, you can enrich data in only one record type.**
   - **Calculated columns. For example, the default view of contacts includes a column for Full Name. Full Name is derived from the First Name, Middle Name, and Last Name values, and cannot be imported.**
   - **Columns containing** lookup attributes. Any changes to data in lookup attributes cannot be updated.
2. Export the data to Excel, including columns required for re-import.
3. Click the **Export to Excel**.
4. Select **Static worksheet with records from this page**, and select **Make this data available for re-importing by including required columns**.
5. Click **Export**, click **Save**, and then click **Save** again to save the spreadsheet.
6. Open the Excel spreadsheet.

   If you see an error message, **The file you are trying to open 'Filename' is in a different format than specified by the file extension**, click **Yes**.
7. Add new data or change existing data in the spreadsheet.

   Important

   Do not delete or modify the data in columns that are marked DO NOT MODIFY.

Some columns in the spreadsheet are kept hidden on purpose:

- Two hidden columns. One column contains the globally unique identifier (GUID) for the record. The other column contains the date and time the record was modified last.
- The column headings.

8. Save the spreadsheet.
9. On the **File** tab, click **Tools**, and then click **Import Data**.
10. Select the spreadsheet file that you saved in step 5. Note that:
    - You can only update the modified rows or create records from the inserted rows of the exported file. The Import Data Wizard does not recognize deleted rows from the exported file. That is, if you delete a row from the exported file and then reimport the file, the corresponding record in Microsoft Dynamics CRM will not be deleted.
    - A record will not update if it was changed in Microsoft Dynamics CRM after it was exported.
    - Make sure that you select the **Enrich data by updating records rather than creating new records** check box. The records will not update if you do not select this check box.
11. Click **Next**.
12. To complete the import, follow the instructions in the Import Data Wizard.
13. If necessary, rename the import job and change the notification options, and then click **Import**.

    An import job is started in the background. You can continue to work in Microsoft Dynamics CRM while the import runs.

Notes

- By default, in Microsoft Dynamics CRM, you cannot export a list of more than 10,000 records at a time to a static Excel worksheet. To work around this limitation, use Advanced Find to limit records in each export to fewer than 10,000 records, and then combine your exported spreadsheets. More information: Work with Advanced Find.
- By default, the maximum size of the files that you can import is 8 megabytes (MB). This means:
    - Any .csv, .txt, or .xml file must not exceed 8 MB in size.
    - The total size of the .zip file with the attachment folder cannot exceed 32 MB.
    - The total size of the extracted files must not exceed 200 MB.

Related Topics

Find Things 9
Export Data to Excel 61
Importing Data 77

Download a template for data import

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

1. In the Navigation Pane, click **Settings**, click **Data Management**, and then click **Templates for Data Import**.

   - OR -

   On the **Get Started** pane, click **Download the Data Import Template**.

2. Select the record type for which you want to download the template, and then click **Download**.
3. In the **File Download** box, click **Save**. Navigate to the location where you want to save the file, and then click **Save**.

   More information: About the Data Import Template.

   Note
   If you are using Microsoft Excel 2010, do not click **Open**. Clicking **Open** results in the error "The file is corrupt and cannot be opened." To avoid this, first save the file, and then open it. If the file still does not open, do the following:

   a. Right-click the downloaded file, and click **Properties**.
   d. On the **General** tab, for **Security**, click **Unblock**.
   e. Open Microsoft Excel 2010.
   f. Click the **File** tab, and then click **Options**.
   g. Click **Trust Center**, and then click **Trust Center Settings**.
   h. Click **Protected View**, and then select the **Enable Protected View for files originating from Internet** option.

      a. In Microsoft Excel 2010, enable Protected View for files originating from Internet.
      d. Add the Microsoft Dynamics CRM URL to your browser’s Trusted site security zone.
      e. Unblock the security in the downloaded Excel file.

View the progress and results of an import, and correct errors

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

You must wait for an import job to complete before you can repair failures.

1. In the Navigation Pane, click **Workplace**, and then under **My Work**, click **Imports**.
2. Monitor the progress of the import.

   To monitor status for an import, watch the **Status Reason** column. The values will change from **Submitted** to **Parsing** to **Transforming** to **Importing** to **Completed**.

These values correspond with the three stages of each import: parsing the file, transforming the data, and importing the data. For detailed information about the progress of the import job, double-click the import job record, and then under **Common**, click **System Jobs**. One system job is created for each import stage.

Tip: To refresh the status, click the **Refresh** button .

3. After the import is complete, view the summary information. It shows the number of records created and the number of records that contain errors.
4. Do one or more of the following:
   - Open the import record to view the records that did not import. Double-click the import record.
   - View records that were successfully imported. Under **Related**, click *<record types>* **Fully Imported**.
   - View records that were partially imported. Under **Related**, click *<record types>* **Partially Imported**.
   - View rows that were not imported. Under **Related**, click **Failures**.
5. Export rows that failed to import to a new comma-separated value (CSV) file. Click **Export Error Rows**. You can correct the errors in this file, and then import it.

Related Topics

Importing Data 77

Create a data map for use with import

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

In Microsoft Dynamics CRM, you can create data maps by saving the changes to the mappings you did during an import as a new data map.

1. On the **File** tab, click **Tools**, and then click **Import Data**.
2. Upload a file for import. More information: *Import records from a file*
3. Review the files that you have uploaded and change the delimiters, if required. More information: *Import records from a file*
4. Select **Default (Automatic Mapping)** or any other existing data map.

   If the Import Data Wizard is unable to map your source data automatically, you will be shown the **Map Record Types** and **Map Fields** pages to manually map your data.

   - OR -

   If your source files and columns are automatically mapped to Microsoft Dynamics CRM record types and fields and if you need to change the mapping, on the **Review Mapping Summary** page, click **Edit**.
5. Change the record type and field mappings, as required. More information: *Import records from a file* (on page 81).

6. On the **Review Settings and Import Data** page, specify a name for the new data map, and click **Submit**.

   This data map is added to the existing data map list under **Customized Maps** on the **Select Data Map** page. You can use this data map later for importing data from similar sources.

Export a data map

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

1. In the Navigation Pane, click **Settings**, click **Data Management**, and then click **Data Maps**.
2. On the Actions toolbar, click **Export**.
3. In the **File Download** dialog box, click **Open** or **Save**.

   Note
   Exported XML files containing data maps can be edited manually. The complete syntax can be found in the Data Map Schema section. More information: Data Map Schema Reference.

Import a data map

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

1. In the Navigation Pane, click **Settings**, click **Data Management**, and then click **Data Maps**.
2. On the Actions toolbar, click **Import**.
3. In the **Import Data Map** dialog box, type the name of the file to import, or click **Browse** locate the file, and then click **OK**.

   A data map must be a well-formed and valid XML file.

   Note
   Exported XML files containing data maps can be edited manually. The complete syntax can be found in the Data Map Schema section. More information: Data Map Schema Reference.

   Tip
   If you create a data map that you think will be useful for other users in your organization, you can share it. More information: *Share or Assign Records and Views* (on page 52)

You do not have to change a data map when importing data. Before you import your data, export an existing data map, change the exported data map, and then re-import the changed data map for the data import.

1. Export and rename a data map.
   a. Click **Data Maps**.
   b. Select a map, and then click **Export**.
   c. Specify the location in which to save your file, and then click **Save**.

2. Open the new data map in your choice of XML editor.
3. Make changes to the data map following the required schema.

   More information: Data Map Schema Reference
4. Import the new data map.
   a. Click **Data Maps**.
   b. Click **IMPORT**, click **BROWSE**, select a file, and then click **Open**.
5. Test the new data map by importing a limited amount of data before importing large amounts of data.

Running Reports and Analyzing Data

When you want to analyze data or view a report in Microsoft Dynamics CRM, there are several ways to view the relevant data:

- Run a default report. More information: *Default Reports* (on page 97)
- Use Advanced Find to search for the subset of data you need. Then export the results list to a static or dynamic Microsoft Office Excel worksheet or a PivotTable for further analysis. Once the data is exported, you can create your own Microsoft Office Word file and mail-merge the data. More information: *Export Data to Excel* (on page 61)
- Create your own report:
  - Use the Report Wizard to create a new Reporting Services report. More information: Create, Edit, or Copy a Report Using the Report Wizard
  - Add any exported Excel file as a personal report, and share it with your colleagues, if warranted.

    Or, ask your system administrator or system customizer to add any exported Excel file as a report available to everyone in your organization. More information: *Customizing and Organizing Reports* (on page 95)
  - Add any file or link to a Web page as a personal report, and share it with your colleagues, if needed. More information: *Customizing and Organizing Reports* (on page 95)

Reports can be used when Microsoft Dynamics CRM for Outlook is offline. More information: *Working Offline* (on page 486)

Customizing and Organizing Reports

Microsoft Dynamics CRM includes default reports for many common business needs. However, most organizations customize the default reports and add custom reports for specific needs. To customize reports, you need to understand:

- Report ownership
- Report types
- Data security

- Options for creating new reports
- Options for modifying existing reports

Report Ownership

System reports are available to all users. Reports owned by individual users can be shared with specific colleagues or teams, or can be made available to the organization so that all users can use them.

Report Types

Microsoft Dynamics CRM supports two types of Microsoft SQL Server Reporting Services report:

- **SQL-based Reporting Services report.** These use SQL queries and filtered views to retrieve report data. Filtered views restrict the report data to what is available to the security role of the person running the report. Filtered views exist for all record types. Creating a new record type automatically creates a new filtered view. All the default reports that are shipped with Microsoft Dynamics CRM are SQL-based reports.
- **Fetch-based Reporting Services report.** These reports use Microsoft Dynamics CRM Report Authoring Extension queries that are proprietary to Microsoft Dynamics CRM instead of filtered views to retrieve data for reports. Reports that are created using the Report Wizard in Microsoft Dynamics CRM are Fetch-based reports.

These reports can be:

- Links to Web pages.
- Static files.
- Dynamic Microsoft Office Excel files that read data from the Microsoft Dynamics CRM database.

For each report, you can edit the report properties. This includes the following:

- File name or URL.
- Display name.
- Description.
- Information about where the report displays in the user interface.

Data Security

All reports read Microsoft Dynamics CRM data from filtered views, which filter the data based on the user's security role. Reports only display data that the person running the report has permission to view.

Options for Creating New Reports

To create a new report, users with appropriate permissions can:

- Add a file or a link to a Web page as a report.
- Run the Report Wizard to create a new Reporting Services report. The Report Wizard can create table and chart reports, including drill-through reports and top N reports.
- Write a new Fetch-based Reporting Services report. These reports use fetch XML queries that are proprietary to Microsoft Dynamics CRM in order to retrieve report data. To author custom fetch-based

reports, you must install Microsoft Dynamics CRM Report Authoring Extension. More information: *Create a Custom Fetch-Based Reporting Services Report*

Creating a new Reporting Services report requires a report development environment.

You can also use the following built-in reporting tools:

- *Export Data to Excel* (on page 61)
- *Create Customer-Ready Documents and Messages* (on page 164)

Options for Modifying Existing Reports

For existing reports, users with appropriate permissions can:

- Organize reports into categories to control which views in the Reports area display each report.
- Determine where a report is visible in the user interface, and edit other properties of the report.
- Edit a report created with the Report Wizard.
- Edit the default filter for default reports and reports created with the Report Wizard.
- Share a personal report with other users, or make it available to everyone in your organization.

Data Security

In Microsoft Dynamics CRM, reports are solution aware. Adding a report as a component to a solution makes it become a single unit of software that extends Microsoft Dynamics CRM functionality and the user interface. Only reports that are organization-owned or visible to the organization can be added to solutions.

Note

To find if a report is viewable to the organization:

- In the **Records** group, click **Edit**. Then, on the **Administration** tab, see if **Viewable By** is set to **Organization**.

Snapshots of reports cannot be added, imported, or exported as part of a solution. In Microsoft Dynamics CRM, reports, sub reports, report category, report display area, and report-related record type are considered as components of a report set. When you import a solution update in a non-overwrite mode, any updates by the solution to a report will be ignored if any component of the report set has been customized.

Default Reports

Microsoft Dynamics CRM has four categories of default reports: sales, marketing, service, and administrative.

This topic shows you how to use the different reports. To find more information, when you generate a report, click **Help**, and then click **Help on This Page**.

Sales

The following default sales reports are available:

- Account Distribution Report
- Account Overview Report
- Account Summary Report

- Activities Report
- Competitor Win Loss Report
- Invoices Report
- Invoice Status Report
- Lead Source Effectiveness Report
- Neglected Leads Report
- Orders Report
- Quotes Report
- Sales Pipeline Report
- Sales History Report
- Neglected Accounts Report
- Products by Account Report
- Products by Contact Report
- Progress Against Goals Report

Account Distribution Report

Use this report to identify patterns in your top revenue-generating accounts using two charts. The earned revenue chart displays the earned revenue grouped by a market facet, such as product, territory, or industry. The accounts count chart displays the amount of earned revenue using the same grouping as the earned revenue chart.

Is data missing from the report?

There are several possible reasons why data that you expect to be in a report does not appear:

- **Security.** If you don't have permission in Microsoft Dynamics CRM to view a record, it will not appear in the report.
- **Data is not entered in Microsoft Dynamics CRM.** The person entering data might have left fields empty.
- **Data does not match the criteria for the report.** This report is generated from revenue that is based on opportunity records that are closed as won. Other revenue is not measured in the report.

Where the data in this report comes from in Microsoft Dynamics CRM

- **Account** form

Note
This topic documents the default report as it was shipped. To find out if this report has been customized, contact your report administrator or system administrator.

Related Topics

Run a Report 132
Export Data to Excel 61
Customizing and Organizing Reports 95

Account Overview Report

Use this report to obtain a one-page overview of everything occurring with an account. The report displays a profile of the account, contact information, and summaries of opportunities and case activities.

For opportunities, this report displays two charts. The Active Opportunities by Probability chart displays the active opportunities grouped by the probability of the opportunities turning into a sale. The Opportunity by Current State chart displays the state the opportunities are currently in.

For cases, this report displays two charts. The All Closed Cases by Customer Satisfaction displays the closed cases grouped by customer satisfaction level. The All Cases by Status displays the cases grouped by the status.

Is data missing from the report?

There are several possible reasons why data that you expect to be in a report does not appear:

- **Security.** If you don't have permission in Microsoft Dynamics CRM to view a record, it will not appear in the report.
- **Data is not entered in Microsoft Dynamics CRM.** The person entering data might have left fields empty.
- **Data does not match the criteria for the report.** By default, this report displays only accounts that have been modified within the last 30 days.

Where the data in this report comes from in Microsoft Dynamics CRM

- **Account** form
- **Appointment** form
- **Case** form
- **Contact** form
- **E-mail** form
- **Fax** form
- **Opportunity** form
- **Phone Call** form
- **Service Activity** form
- **Task** form

Note
This topic documents the default report as it was shipped. To find out if this report has been customized, contact your report administrator or system administrator.

Related Topics

Run a Report 132
Export Data to Excel 61
Customizing and Organizing Reports 95

Account Summary Report

Use this report to determine historically what has occurred with an account. This report also displays what is scheduled to occur in the future. The report displays a chronological summary for an account, including sales and service activities, notes, and records.

Is data missing from the report?

There are several possible reasons why data that you expect to be in a report does not appear:

- **Security.** If you don't have permission in Microsoft Dynamics CRM to view a record, it will not appear in the report.
- **Data is not entered in Microsoft Dynamics CRM.** The person entering data might have left fields empty.
- **Data does not match the criteria for the report.** This report cannot display more than 10 accounts at a time.

Where the data in this report comes from in Microsoft Dynamics CRM

- **Activity** form
- **Case** form
- **Contact** form
- **Contract** form
- **Invoice** form
- **Note** form
- **Opportunity** form
- **Order** form
- **Quote** form

Tip
To quickly view the Account Summary report for an account, open the account record. On the **Account** tab, in the **Data** group, click **Run Report**, and then click **Account Summary**.

Note
This topic documents the default report as it was shipped. To find out if this report has been customized, contact your report administrator or system administrator.

Related Topics

Run a Report 132
Export Data to Excel 61
Customizing and Organizing Reports 95

Activities Report

Use this report to identify patterns in activities. Activities can be grouped by owner or activity type, or by the record the activity is regarding.

Is data missing from the report?

There are several possible reasons why data that you expect to be in a report does not appear:

- **Security.** If you don't have permission in Microsoft Dynamics CRM to view a record, it will not appear in the report.
- **Data is not entered in Microsoft Dynamics CRM.** The person entering data might have left fields empty.
- **Data does not match the criteria for the report.** By default, this report only displays activities created within the last week. This report considers only the activities that are related to case and opportunity records.

Where the data in this report comes from in Microsoft Dynamics CRM

- **Activity** form

Note
This topic documents the default report as it was shipped. To find out if this report has been customized, contact your report administrator or system administrator.

Related Topics

Creating and Using Workflows 223
Run a Report 132
Export Data to Excel 61
Customizing and Organizing Reports 95
Completing Sales Transactions 340
Work with Quotes 340

Competitor Win Loss Report

Use this report to compare how your sales team performs against your competitors. The report displays a list of competitors, with data on open, closed, won, and lost opportunities for each.

Is data missing from the report?

There are several possible reasons why data that you expect to be in a report does not appear:

- **Security.** If you don't have permission in Microsoft Dynamics CRM to view a record, it will not appear in the report.
- **Data is not entered in Microsoft Dynamics CRM.** The person entering data might have left fields empty.
- **Data does not match the criteria for the report.** By default, this report displays only opportunities that have competitors associated, that the user running the report has permission to view, and that are in the country or region and time period specified by the person running the report.

Where the data in this report comes from in Microsoft Dynamics CRM

- **Close Opportunity** dialog box
- **Competitor** form
- **Opportunity** form

Note
This topic documents the default report as it was shipped. To find out if this report has been customized, contact your report administrator or system administrator.

Related Topics

Run a Report 132
Export Data to Excel 61
Customizing and Organizing Reports 95

Invoices Report

Use this report to print invoices.

Is data missing from the report?

There are several possible reasons why data that you expect to be in a report does not appear:

- **Security.** If you don't have permission in Microsoft Dynamics CRM to view a record, it will not appear in the report.
- **Data is not entered in Microsoft Dynamics CRM.** The person entering data might have left fields empty.
- **Data does not match the criteria for the report.** If you run this report from a list without selecting any records, the report generates a customer-ready invoice for each invoice record in the system. If you run this report from within a specific record, the report generates a customer-ready invoice only for the record you were working with.

Where the data in this report comes from in Microsoft Dynamics CRM

- **Invoice** form

Note
This topic documents the default report as it was shipped. To find out if this report has been customized, contact your report administrator or system administrator.

Related Topics

Creating and Using Workflows 223
Run a Report 132
Export Data to Excel 61
Customizing and Organizing Reports 95
Completing Sales Transactions 340
Work with Invoices 364

Lead Source Effectiveness Report

Use this report to compare how effective your lead sources are at generating quality opportunities. The report lists the percentage of qualified leads, and leads that generate revenue for each lead category.

Is data missing from the report?

There are several possible reasons why data that you expect to be in a report does not appear:

- **Security.** If you don't have permission in Microsoft Dynamics CRM to view a record, it will not appear in the report.
- **Data is not entered in Microsoft Dynamics CRM.** The person entering data might have left fields empty.
- **Data does not match the criteria for the report.** By default, this report displays all leads.

Where the data in this report comes from in Microsoft Dynamics CRM

- **Lead** form

Note
This topic documents the default report as it was shipped. To find out if this report has been customized, contact your report administrator or system administrator.

Related Topics

Run a Report 132
Export Data to Excel 61
Customizing and Organizing Reports 95

Neglected Leads Report

Use this report to identify any leads that have not been contacted. The report displays a chart of leads that have had no associated activities or notes during a specified time period.

Is data missing from the report?

There are several possible reasons why data that you expect to be in a report does not appear:

- **Security.** If you don't have permission in Microsoft Dynamics CRM to view a record, it will not appear in the report.
- **Data is not entered in Microsoft Dynamics CRM.** The person entering data might have left fields empty.
- **Data does not match the criteria for the report.** By default, this report displays only active leads, with no activities or notes, in the number of days specified by the person running the report.

Where the data in this report comes from in Microsoft Dynamics CRM

- **Lead** form

Note
This topic documents the default report as it was shipped. To find out if this report has been customized, contact your report administrator or system administrator.

Related Topics

Run a Report 132
Export Data to Excel 61
Customizing and Organizing Reports 95

Orders Report

Use this report to print orders.

Is data missing from the report?

There are several possible reasons why data that you expect to be in a report does not appear:

- **Security.** If you don't have permission in Microsoft Dynamics CRM to view a record, it will not appear in the report.
- **Data is not entered in Microsoft Dynamics CRM.** The person entering data might have left fields empty.
- **Data does not match the criteria for the report.** If you run this report from a list without selecting any records, the report generates a customer-ready order for each active order record in the system. If you run this report from within a specific record, the report generates a customer-ready order only for the record you were working with.

Where the data in this report comes from in Microsoft Dynamics CRM

- **Order** form

Note
This topic documents the default report as it was shipped. To find out if this report has been customized, contact your report administrator or system administrator.

Related Topics

Customizing and Organizing Reports 95
Completing Sales Transactions 340
Work with Orders 352

Quotes Report

Use this report to print quotes.

Is data missing from the report?

There are several possible reasons why data that you expect to be in a report does not appear:

- **Security.** If you don't have permission in Microsoft Dynamics CRM to view a record, it will not appear in the report.
- **Data is not entered in Microsoft Dynamics CRM.** The person entering data might have left fields empty.
- **Data does not match the criteria for the report.** If you run this report from a list without selecting any records, the report generates a customer-ready quote for each quote record in the system. If you run this report from within a specific record, the report generates a customer-ready quote only for the record you were working with.

Where the data in this report comes from in Microsoft Dynamics CRM

- **Quote** form

Note
This topic documents the default report as it was shipped. To find out if this report has been customized, contact your report administrator or system administrator.

Related Topics

Creating and Using Workflows 223
Run a Report 132
Export Data to Excel 61
Customizing and Organizing Reports 95
Completing Sales Transactions 340
Work with Quotes 340

Sales Pipeline Report

Use this report to see anticipated potential sales. The report displays a chart of potential sales grouped by user, sales territory, customer territory, date, products, rating, or sales stage.

Note
Opportunities (potential sales) can be filtered based on the sales stages the opportunities are in. The sales process with stages can be implemented using a workflow (process). For more information, see Creating a sales process with stages using a workflow.

Is data missing from the report?

There are several possible reasons why data that you expect to be in a report does not appear:

- **Security.** If you don't have permission in Microsoft Dynamics CRM to view a record, it will not appear in the report.
- **Data is not entered in Microsoft Dynamics CRM.** The person entering data might have left fields empty.
- **Data does not match the criteria for the report.** If you group by product, this report cannot display user provided revenue from opportunities.

Where the data in this report comes from in Microsoft Dynamics CRM

- **Opportunity** form
- **Territory** form

Note
This topic documents the default report as it was shipped. To find out if this report has been customized, contact your report administrator or system administrator.

Related Topics

Creating and Using Workflows 223
Customizing and Organizing Reports 95

Sales History Report

Use this report to view a history of sales performance by sales representative. The report displays a chart of both lost and earned revenue. The report uses data only from the closed opportunities, and calculates the earned revenue from Won opportunities and the lost revenue from the lost opportunities.

Is data missing from the report?

There are several possible reasons why data that you expect to be in a report does not appear:

- **Security.** If you don't have permission in Microsoft Dynamics CRM to view a record, it will not appear in the report.
- **Data is not entered in Microsoft Dynamics CRM.** The person entering data might have left fields empty.

Where the data in this report comes from in Microsoft Dynamics CRM

- **Account** form
- **Contact** form
- **Opportunity** form

Note
This topic documents the default report as it was shipped. To find out if this report has been customized, contact your report administrator or system administrator.

Related Topics

Run a Report 132
Export Data to Excel 61
Customizing and Organizing Reports 95

Neglected Accounts Report

Use this report to identify accounts that have not been contacted recently. The report displays a chart with accounts that have had no activities completed in a specified number of days.

Is data missing from the report?

There are several possible reasons why data that you expect to be in a report does not appear:

- **Security.** If you don't have permission in Microsoft Dynamics CRM to view a record, it will not appear in the report.
- **Data is not entered in Microsoft Dynamics CRM.** The person entering data might have left fields empty.
- **Data does not match the criteria for the report.** By default, this report displays only active accounts, with no activities or notes, in the number of days specified by the person running the report.

Where the data in this report comes from in Microsoft Dynamics CRM

- **Account** form
- **Task** form
- **Phone Call** form
- **E-mail** form
- **Letter** form
- **Appointment** form
- **Service Activity** form
- **Campaign Response** form
- **Account** form

Note
This topic documents the default report as it was shipped. To find out if this report has been customized, contact your report administrator or system administrator.

Related Topics

Run a Report 132
Export Data to Excel 61
Customizing and Organizing Reports 95

Products by Account Report

Use this report to see which products are used by an account. For each account, the report lists the associated products.

Is data missing from the report?

There are several possible reasons why data that you expect to be in a report does not appear:

- **Security.** If you don't have permission in Microsoft Dynamics CRM to view a record, it will not appear in the report.
- **Data is not entered in Microsoft Dynamics CRM.** The person entering data might have left fields empty.
- **Data does not match the criteria for the report.**By default, this report displays only line items for orders that don't have a status of **Canceled**, and line items for opportunities that have a status of **Won**.

Where the data in this report comes from in Microsoft Dynamics CRM

- **Close Opportunity** dialog box
- **Opportunity** form
- **Order** form
- **Product** form

Note
This topic documents the default report as it was shipped. To find out if this report has been customized, contact your report administrator or system administrator.

Related Topics

Run a Report 132
Export Data to Excel 61
Customizing and Organizing Reports 95

Products by Contact Report

Use this report to see which products are used by a contact. For each contact, the report lists the associated products.

Is data missing from the report?

There are several possible reasons why data that you expect to be in a report does not appear:

- **Security.** If you don't have permission in Microsoft Dynamics CRM to view a record, it will not appear in the report.
- **Data is not entered in Microsoft Dynamics CRM.** The person entering data might have left fields empty.
- **Data does not match the criteria for the report.**By default, this report displays only line items for orders that don't have a status of **Canceled**, and line items for opportunities that have a status of **Won**.

Where the data in this report comes from in Microsoft Dynamics CRM

- **Close Opportunity** dialog box
- **Order** form
- **Product** form

Note
This topic documents the default report as it was shipped. To find out if this report has been customized, contact your report administrator or system administrator.

Related Topics

Run a Report 132
Export Data to Excel 61
Customizing and Organizing Reports 95

Marketing

The following default marketing reports are available:

- Campaign Activity Status Report
- Campaign Comparison Report
- Campaign Performance Report

Campaign Activity Status Report

Use this report to track a campaign. The report displays a summary for each campaign activity, including planned and actual time parameters, parent campaign details, and definition status.

Is data missing from the report?

There are several possible reasons why data that you expect to be in a report does not appear:

- **Security.** If you don't have permission in Microsoft Dynamics CRM to view a record, it will not appear in the report.
- **Data is not entered in Microsoft Dynamics CRM.** The person entering data might have left fields empty.
- **Data does not match the criteria for the report.** By default, this report displays only campaigns with activities or notes that were created within the dates specified by the person running the report.

  Where the data in this report comes from in Microsoft Dynamics CRM

- **Campaigns** form
- **Campaign Activity** form

  Note
  This topic documents the default report as it was shipped. To find out if this report has been customized, contact your report administrator or system administrator.

Related Topics

Run a Report 132
Export Data to Excel 61
Customizing and Organizing Reports 95

Campaign Comparison Report

Use this report to identify your most and least successful campaigns. The report compares two campaigns based on parameters such as cost effectiveness and number of responses.

Is data missing from the report?

There are several possible reasons why data that you expect to be in a report does not appear:

- **Security.** If you don't have permission in Microsoft Dynamics CRM to view a record, it will not appear in the report.
- **Data is not entered in Microsoft Dynamics CRM.** The person entering data might have left fields empty.
- **Data does not match the criteria for the report.** By default, this report displays only data available based on the two reports you select.

  Where the data in this report comes from in Microsoft Dynamics CRM

- **Campaigns** form

  Note
  This topic documents the default report as it was shipped. To find out if this report has been customized, contact your report administrator or system administrator.

Related Topics

Run a Report 132
Export Data to Excel 61
Customizing and Organizing Reports 95

Campaign Performance Report

Use this report to track the progress and status of your campaigns. The report provides a detailed view, including all the dates, targets, definitions, responses, and financial returns from each campaign.

Is data missing from the report?

There are several possible reasons why data that you expect to be in a report does not appear:

- **Security.** If you don't have permission in Microsoft Dynamics CRM to view a record, it will not appear in the report.
- **Data is not entered in Microsoft Dynamics CRM.** The person entering data might have left fields empty.
- **Data does not match the criteria for the report.** By default, this report displays only campaigns modified in the last 30 days.

Where the data in this report comes from in Microsoft Dynamics CRM

- **Campaign Activity** form
- **Campaigns** form
- **Marketing List** form
- **Product** form
- **Sales Literature** form

Note
This topic documents the default report as it was shipped. To find out if this report has been customized, contact your report administrator or system administrator.

Related Topics

Run a Report 132
Export Data to Excel 61
Customizing and Organizing Reports 95

Service

The following default service reports are available:

- Case Summary Table Report

Use this report to find out what kind of cases are being opened and resolved. You can select how data is grouped in both the rows and columns in this report. This report provides a chart of cases, organized by status reason, owner, priority, subject, customer, or product.

- Neglected Cases Report

  Use this report to identify cases that have not been contacted recently. The report displays a chart of cases that have had no changes to activities, notes, or the case itself in the specified number of days, and no scheduled activities.

- Service Activity Volume Report

  Use this report to review the patterns in service activity volume. The report displays either the duration of or number of service activities, grouped by services, resources, time periods, and additional criteria.

- Top Knowledge Base Articles Report

  Use this report to identify the most frequently used articles. The report displays a chart grouped by the subject of the article or case, or by the product associated with the case.

Administrative

The following default administrative report is available:

- User Summary Report

Use this report to identify contact information and Microsoft Dynamics CRM security roles for all Microsoft Dynamics CRM users.

Is data missing from the report?

There are several possible reasons why data that you expect to be in a report does not appear:

- **Security.** If you don't have permission in Microsoft Dynamics CRM to view a record, it will not appear in the report.
- **Data is not entered in Microsoft Dynamics CRM.** The person entering data might have left fields empty.
- **Data does not match the criteria for the report.**If data does not match the criteria for the report, it won't be displayed.

  Where the data in this report comes from in Microsoft Dynamics CRM

- **Users** form

  Note
  This topic documents the default report as it was shipped. To find out if this report has been customized, contact your report administrator or system administrator.

Related Topics

Run a Report 132
Customizing and Organizing Reports 95

Write a Report Using Report-Writing Tools

You can use any ODBC-compliant application to read data directly from the Microsoft Dynamics CRM database. When possible, using built-in reporting tools is easier than using the other ways mentioned in this topic. Recommended alternatives:

- *Export Data to Excel* (on page 61)
- *Create Customer-Ready Documents and Messages* (on page 164)
- Create, Edit, or Copy a Report Using the Report Wizard

Export Data to Excel

You can export any list to Microsoft Office Excel, including the results of an Advanced Find search.

You can export to a static or dynamic Excel worksheet or to a PivotTable.

Create Customer-Ready Documents and Messages

There are two main methods of creating customer-ready documents: mail merge and direct e-mail. With mail merge, you can use Microsoft Office Word and Microsoft Office Word templates to create letters, faxes, envelopes, and e-mail messages. With direct e-mail, you can send a mass mailing of the same message using Microsoft Dynamics CRM e-mail templates to multiple e-mail recipients. This is also known as sending bulk e-mail.

Create, Edit, or Copy a Report Using the Report Wizard

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Report Permissions

How to determine which record types have the data you need

There is one record type for each type of data, such as accounts, contacts, or services.

In addition, there are separate record types for:

- Notes. Every note and attachment is stored as a separate record in the Notes record type.
- Close activities. Whenever you close an opportunity, quote or order, an activity is created that tracks the reason for closing the record. These are stored respectively in the Opportunity Close Activity, Quote Close Activity, and Order Close Activity record types. When you close a case, the data is stored in the Case Resolution Activity.

If your report includes data from communication activities, you have two options:

- If you want data about multiple types of communication activities in one report such as the activity subjects and due dates for all types of activities, use the Activity record type.
- If you need specific information about a specific type of activity, such as the recipients, use the Task, E-mail Message, Fax, Appointment, Letter, or Phone Call record type.

Tip:

- While you are creating your report, keep a window open showing a record from the data type you are including in your report. It will help you determine which columns to include.

All reports that are created using the Report Wizard are Fetch-based reports.

1. In the Navigation Pane, click **Workplace**, and then under **My Work**, click **Reports**.
2. To add a new report, on the **Reports** tab, in the **Records** group, click **New**.
3. In the **Report: New** dialog box, in the **Report Type** list, click **Report Wizard Report**, and then click **Report Wizard**.

   You can only use the Report Wizard to edit reports that were created with the wizard.
4. Select a starting point for your report.
   a. To create a new report, select **Start a new report**.

      - OR -

      To start from a copy of an existing report, select **Start from an existing report**, select the report, and also clear the **Overwrite existing report** check box.

      - OR -

      To edit an existing report, select **Start from an existing report**, select the report, and check the **Overwrite existing report** check box.

   b. If multiple languages are installed, select the language to use for column names, record types, and wizard-generated text in the report.

   c. Click **Next**.
5. Enter the name of the report, and specify which record types the report will use.

   The purpose of this step is to identify where the data in the report comes from. You can include data from one or two record types, plus data from related records.

   a. Enter data in each field:

      - **Report name**. This value will be displayed on the **Reports** menu and in the Reports area.
      - **Primary record type**. Data from all fields in this record type and related record types will be available when you are defining criteria for which records to include. Data from this record type will be available when you are selecting fields to display.
      - **Related record type**. If you need to display data from a related record type, select an additional record type here.

      Tip: If you don't need data from a related record type, don't select one, as it makes the report take longer to load.

   b. Click **Next**.
6. Specify which records to include.

   The purpose of this step is to determine which records are included in your report. This information is saved as the default filter for the report.

   You can select criteria based on the selected record types or on columns from related records.

a. To include only records defined by an existing system view or saved view, select a view.

- OR -

To define which records to include by selecting criteria:

- To add a criteria row:
  1. Click **Select**, and specify the field to filter on.
  2. Click the query relational operator, and select an operator.
  3. Click **Enter Value**, and enter a value to filter on. For some values, you can click the **Select or change the values for this field** button to open the **Select Values** dialog box and select the value you want.
- To group criteria, you must select two or more rows for the same record type. For example, **Sales Stage** and **Est. Revenue** are both field values in the **Opportunity** record type and two rows that specify filter criteria for these fields can be grouped. However, rows with field values from different record types, such as **Account** and **Opportunity** record types, cannot be grouped.

b. For each row you want to group, click the **Select Row** button for that row, and then click **Select Row**.
  1. On the Filter toolbar, select **Group AND** or **Group OR**.
  2. To remove a row from a group, click the **Options menu** button for that row, and then click **Delete**.
  3. To select a group, click the **Options menu** button for that group, and then click **Select Group**.
  4. To add a criteria clause to a group, click the **Options menu** button for that group, click **Add Clause**, and then select the field, query relational operator, and value.
  5. To unselect a group that has been previously selected, click the **Options menu** button for that group, and then click **Deselect Group**.
  6. To ungroup a group, click the **Options menu** button for that group, and then click **Ungroup**.
  7. To change a **Group AND** group to a **Group OR** group, or a **Group OR** group to a **Group AND** group, click the **Options menu** button for that group, and then click **Change to OR** or **Change to AND**.

c. Click **Next**.

7. Organize and lay out your data.

   The purpose of this step is to determine which columns to include, the order in which they are displayed, and whether to group data into subcategories. At a minimum, a report just includes columns. By grouping and summarizing the data, you make it easier to see the patterns.

   For example, your report could use one level of grouping to group opportunities by salesperson, or add a second level of grouping to show each quarter's opportunities, or add a third level to show the percentage won and lost in each quarter.

   To use a chart in your report, if your report has no grouping, you must select at least one numeric column. If your report uses grouping, you must select at least one numeric column with a summary type defined.

a. Define how to organize the report:

- To group items so that they are organized together in the report by date or other common properties:

  1. For each grouping level you need, click **Click here to add a grouping**.
  2. Define the grouping:

  - **Record type**. You can select records from the primary record type you selected, and from any related record types. If you selected a secondary record type, you can also select records from the secondary record type and its related records types.
  - **Column**. The name of the Microsoft Dynamics CRM field that contains the data to define the grouping.
  - **Time interval**. For datetime fields, group the data by Month, Day, Week, or Year.
  - **Sort order**. Sort order for displaying the groups.
  - **Column width**. Width of the column heading in pixels.
  - **Summary type**. You can group records by a count of matching records.

  3. To reorder the grouping levels, use the up and down arrows in the **Common Tasks** section.
  4. Click **OK**.

- To define the sort order within each group, click **Configure Sorting**, select a column and sort order, and then click **OK**.
- To limit reports to groups with the highest or lowest values, click **Set Top or Bottom Number**:

  1. Select **Top** or **Bottom**.
  2. Select the number of groups to display.
  3. Click **OK**.

c. Define which COLUMNS to display in the report. You can display columns that show data from a record, or columns that show summary information:

  1. For each column you want to include, click **Click here to add a column**:

  - **Record type**. You can select records from the primary record type you selected, and from any related record types. If you selected a secondary record type, you can also select records from the secondary record type and its related records types.
  - **Column**. The name of the Microsoft Dynamics CRM field that contains the data to display or summarize.
  - **Data type**. The data type of the column, one of: primarykey, nvarchar, picklist, bit, decimal, int, float, money, ntext, datetime, owner, lookup.
  - **Name**. The name used in the database.
  - **Column width**. The width in pixels of the column.
  - **Summary type**. The specific type of summaries available depends on the data type of the column.
  - **None**: lookup, datetime, owner, picklist, bit, ntext

- **Average**, **Maximum**, **Minimum**, **Percent of Total**, **Sum**: all numeric record types (decimal, int, float, money)
- Use the left and right arrows to reorganize the columns.

2. Click **OK**.

d. Click **Next**.

8. Select whether to use a chart in the report.

   The purpose of this step is to determine whether to use a chart, and which type of chart to use.

   a. Select whether to include a chart:

   - **Table only**. This provides a table grouped and sorted as you specified.
   - **Chart and table**. Displays both a chart and table.
     - **Show table below the chart on same page**. Clicking on the chart does nothing.
     - **Show chart. To view data for a chart region, click the chart region**. Clicking on an area in the chart will display a table with details for that section of the chart.

   b. Click **Next**.

9. If the report includes a chart, format the chart.

   The purpose of this step is to specify the type of chart, and how the data is displayed in the chart.

   a. Select the chart type, and then click **Next**.

   The **Chart preview** area shows how the data will be displayed.

   - For vertical and horizontal bar charts and line charts, specify which data to display on each axis:
     - In the **Format Column (X) Axis** section, select the field to use for the X axis, and the label that is displayed on the chart for the field.
     - In the **Format Value (Y) Axis** section, you can select two fields. For each field, you can specify the label that is displayed on the chart.
     - In the **Format Labels and Legends** section, specify whether or not to show the data labels and a legend.
   - For pie charts, specify the slices and values for the chart.
     - For slices, you must select one of the groupings in your report.
     - For values, you must select a numeric column with a summary type.

   b. Click **Next**.

10. Review the summary of the report, click **Next**, and then click **Finish**.

11. Determine where the report can be run from.

    When you finish defining the report, you return to the Report form, where you can update the name and description of the report, and determine where the report is displayed:

    - **Categories**

To specify the categories to include in this report, click the **Select or change the values for this field** button , and then select the categories. More information: System Settings Dialog Box - Reporting Tab

By default, a new report is not put into any category. If you want the report to be included in the category views in the Reports area, such as the **Marketing Reports** view, add a category in the **Categories** box.

- **Related Record Types**

  To have the report appear in the **Reports** list on a page for specific record types, click the **Select or change the values for this field** button , and then select record types.

  For example, if your new report includes data from accounts and activities, select **Accounts** and **Activities**.

- **Display In**

  To specify where reports should be visible, click the **Select or change the values for this field** button , and then select one or more options:

  - **Reports area**

    Report will be displayed in the Reports area.

  - **Forms for related record types**

    Report will be displayed on the form for the record type that you select in **Related Record Types**.

  - **Lists for related records types**

    Report will be displayed from specified list view pages.

If no values are selected, the report will not be visible to end-users. To view or manage reports not visible to end-users, in the Reports area, select the **All Reports, Including Sub-Reports** view.

- **Languages**

  If your Microsoft Dynamics CRM implementation has multiple languages enabled, specify a language. The report will be displayed for all users who have selected that language in their personal options. To make this report available to all users, select **All Languages**.

  Note that this does not change the language used inside the report.

Tip: If you use the Microsoft Dynamics CRM for Outlook with Offline Access, by default all reports that you own will be available when you are offline. More information: Work with Data to Take Offline

12. Test the report, and modify it if needed.

    On the Report toolbar, click **Run Report** .

    If the report needs modifications, start with step 2 and edit the existing report.

13. Determine who can use the report.

    By default, the report is a personal report. This means that you are the only one who can use it.

    - To share this report with other users, in the Reports area, select the report. Then on the **Reports** tab, in the **Collaborate** group, click **Share**.

- To make this report available to everyone in the organization, in the Reports area, select the report. On the **Reports** tab, in the **Records** group, click **Edit**. Then, click the **Administration** tab, and click **Organization**.
- To change the owner, in the Reports area, select the report. On the **Reports** tab, in the **Records** group, click **Edit**. Then, click the **Administration** tab, and select an owner.

If you use the Microsoft Dynamics CRM for Outlook with Offline Access, by default all reports that you own will be available when you are offline. More information: Work with Data to Take Offline

Notes

- To edit an existing Report Wizard report, first select the report. Then, in the **Records** group, click**Edit**. Finally, click **Report Wizard**.
- All reports generated with the Report Wizard print in landscape mode.
- If you need to change data on the **General** or **Administration** tabs for a new report, wait until the report is saved before making the changes. Any changes on these tabs made before a report is saved will be ignored.

Use Microsoft Office Excel 2003

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Report Permissions

1. To create a PivotTable, in Excel 2003, on the **Data** menu, click **PivotTable and PivotChart Report**.

   - OR -

   To create a worksheet, in Excel 2003, on the **Data** menu, click **Import External Data**, and then click **New Database Query**.

2. Create a new data source for the Microsoft Dynamics CRMdatabase, or if you already have a data source set up that connects to theMicrosoft Dynamics CRMdatabase, connect to it.

   - To create a new data source:

   a. If you are creating a data source for a PivotTable, in the **PivotTable and PivotChart Wizard - Step 1 of 3** dialog box, select **External Data Source**, click **Next**, and then click **Get Data**.

   b. In the **Choose Data Source** dialog box, select **<New Data Source>**, and then click **OK**.

   c. In the **Create New Data Source** dialog box, type a name for the data source, and then in the driver list, select **SQL Server**.

   d. Click **Connect**.

   e. In the **SQL Server Login** dialog box, in the **Server** list, select the Microsoft SQL Server or server instance where the Microsoft Dynamics CRM database is installed, and then click **Options**.

   f. In the **Database** box, select *Organization*_**MSCRM**, and then click **OK** three times.

   The **Query Wizard** dialog box opens.

   - To connect to an existing data source that uses the Microsoft Dynamics CRM database:

a. If you are creating a data source for a PivotTable, in the **PivotTable and PivotChart Wizard - Step 1 of 3** dialog box, select **External Data Source**, click **Next**, and then click **Get Data**.

b. Select an existing data source that uses the Microsoft Dynamics CRM database, and then click **OK**.

3. In the **Query Wizard Available tables and columns list** dialog box, select filtered views that start with the prefix **Filtered**

   You can select columns within each filtered view, and select multiple filtered views.

   Caution To integrate with built-in security, only include filtered views in your query. If you connect directly to a database table, the spreadsheet may fail to return data for other users.

4. Continue with the Query Wizard. For more information about the Query Wizard, click the **Help** button to open Microsoft Query Help. For more information about importing external data to Excel, search for "import external data" in Excel Help.

5. For PivotTables, in the **PivotTable and PivotChart Wizard - Step 2 of 3** dialog box, click **Next**, and then click **Finish**. Then drag the fields as needed to your PivotTable.

   Tip

   To share your new file with other users, do one of the following:

   - Add your file as a report in Microsoft Dynamics CRM, and select the report. On the **Reports** tab, in the **Collaborate** group, click **Share**, and specify users with whom to share the report.
   - If the report would be useful for all users, add your file as a report in Microsoft Dynamics CRM, and ask your system administrator to make it available to the organization. If you have the appropriate permissions:

     a. In the list of reports, select the report.

     b. On the **Reports** tab, in the **Records** group, click **Edit**.

     c. On the **Actions** menu, click **Make Report Available to Organization**.

     - Put the report in a shared file system.

   - E-mail the report to other Microsoft Dynamics CRM users in the same domain.

Related Topics

Running Reports and Analyzing Data 95
Write a Report Using Report-Writing Tools 112
Customizing and Organizing Reports.....95

Use Microsoft Office Excel 2007

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Report Permissions

1. In Excel 2007 or Microsoft Excel 2010, on the **Data** tab, in the **Get External Data** group, click **From Other Sources**, and then click **From Microsoft Query**.

2. In the **Choose Data Source** dialog box, select **<New Data Source>**, and then click **OK**.
3. In the **Create New Data Source** dialog box, type a name for the data source, and then in the driver list, select **SQL Server**.
4. Click **Connect**.
5. In the **SQL Server Login** dialog box, in the **Server** list, select the Microsoft SQL Server or server instance where the Microsoft Dynamics CRM database is installed, and then click **Options**.
6. In the **Database** box, select *Organization*_**MSCRM**, and then click **OK** three times.

   The **Query Wizard - Choose Columns** dialog box opens.
7. In the **Query Wizard - Choose Columns** dialog box, select filtered views that start with the prefix **Filtered**.

   You can select columns within each filtered view, and select multiple filtered views.

   Caution To integrate with built-in security, only include filtered views in your query. If you connect directly to a database table, the spreadsheet may fail to return data for other users.
8. Continue with the Query Wizard. For more information about the Query Wizard, click the **Help** button to open Microsoft Query Help. For more information about importing external data to Excel, search for "import external data" in Excel Help.

   Tip
   To share your new file with other users, do one of the following:

   - Add your file as a report in Microsoft Dynamics CRM, and select the report. On the **Reports** tab, in the **Collaborate** group, click **Share**, and specify users with whom to share the report.
   - If the report would be useful for all users, add your file as a report in Microsoft Dynamics CRM, and ask your system administrator to make it available to the organization. If you have the appropriate permissions:
     d. In the list of reports, select the report.
     e. On the **Reports** tab, in the **Records** group, click **Edit**.
     f. On the **Actions** menu, click **Make Report Available to Organization**.
     - Put the report in a shared file system.
     - E-mail the report to other Microsoft Dynamics CRM users in the same domain.

Related Topics

Running Reports and Analyzing Data 95
Write a Report Using Report-Writing Tools 112
Customizing and Organizing Reports 95

Use Microsoft Office Word 2003

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Report Permissions

There are several ways you can merge Microsoft Dynamics CRM data into Microsoft Word 2003. If you use Microsoft Word 2007, you can also use mail merge from Microsoft Dynamics CRM and from Microsoft Dynamics CRM for Outlook.

- Export a list, such as the results of an Advanced Find search, into a dynamic or static Microsoft Office Excel file, and use the Excel file as the data source for a Microsoft Word 2003 mail merge. This does not create a Microsoft Dynamics CRM activity for each merged record. More information: *Export Data to Excel* (on page 61)
- From Microsoft Word 2003, read data directly from the Microsoft Dynamics CRM database. This does not create a Microsoft Dynamics CRM activity for each merged record. This method is described in this topic.

1. In Microsoft Office Word, on the **Tools** menu, point to **Letters and Mailings**, and then click **Mail Merge**.

   Follow the instructions in steps 1 and 2 of the **Mail Merge** pane.
2. In step 3 of the **Mail Merge** instructions, select **Use an existing list**, and then click **Browse**.
3. Click **New SQL Server connection.odc**, and then click **Open**.
4. In the **Server name** box, type the name of the server where the Microsoft Dynamics CRM database is stored, and then click **Next**.
5. In the database list, select the *Organization*_**MSCRM** database.
6. In the **Name** column, select a filtered view that starts with the prefix **Filtered**.
7. Click **Next**, and then click **Finish**.
8. Complete the mail merge by following the remaining steps in the Microsoft Office Word **Mail Merge** pane.

   Tip
   To share your new file with other users, do one of the following:

   - Add your file as a report in Microsoft Dynamics CRM, and select the report. On the **Reports** tab, in the **Collaborate** group, click **Share**, and specify users with whom to share the report.
   - If the report would be useful for all users, add your file as a report in Microsoft Dynamics CRM, and ask your system administrator to make it available to the organization. If you have the appropriate permissions:

     g. In the list of reports, select the report.

     h. On the **Reports** tab, in the **Records** group, click **Edit**.

     i. On the **Actions** menu, click **Make Report Available to Organization**.

     - Put the report in a shared file system.
     - E-mail the report to other Microsoft Dynamics CRM users in the same domain.

Related Topics

Create Customer-Ready Documents and Messages 164
Running Reports and Analyzing Data 95
Write a Report Using Report-Writing Tools 112
Customizing and Organizing Reports 95

Use Microsoft Office Word 2007

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Report Permissions

1. In Word, on the **Mailings** tab, in the **Start Mail Merge** group, click **Start Mail Merge**.
2. Click **Step by Step Mail Merge Wizard**.
3. Follow the instructions in steps 1 and 2 of the **Mail Merge** pane.
4. In step 3 of the **Mail Merge** instructions, select **Use an existing list**, and then click **Browse**.
5. Click **New SQL Server Connection.odc**, and then click **Open**.
6. In the **Server name** box, type the name of the server where the Microsoft Dynamics CRM database is stored, and then click **Next**.
7. In the database list, select the *Organization*_**MSCRM** database.
8. In the **Name** column, select a filtered view that starts with the prefix **Filtered**.
9. Click **Next**, and then click **Finish**.
10. Complete the mail merge by following the remaining steps in the Microsoft Office Word **Mail Merge** pane.

Here are some other ways you can merge Microsoft Dynamics CRM data into Microsoft Word 2007 or Microsoft Word 2010.

- From a list of records, such as the results of an Advanced Find search, use mail merge to merge the data into Word 2007 or Word 2010. You can create letters or e-mail activities for each record in the list. More information: *Create Customer-Ready Documents and Messages* (on page 164)
- From Microsoft Dynamics CRM for Outlook, mail merge data from a list. You can create letters or e-mail activities for each record in the list. More information: *Create Customer-Ready Documents and Messages* (on page 164)
- Export a list, such as the results of an Advanced Find search, into a dynamic or static Microsoft Office Excel file, and use the Excel file as the data source for a Microsoft Word 2007 or Microsoft Word 2010 mail merge. This does not create a Microsoft Dynamics CRM activity for each merged record. More information: *Export Data to Excel* (on page 61)

  Tip

  To share your new file with other users, do one of the following:

- Add your file as a report in Microsoft Dynamics CRM, and select the report. On the **Reports** tab, in the **Collaborate** group, click **Share**, and specify users with whom to share the report.
- If the report would be useful for all users, add your file as a report in Microsoft Dynamics CRM, and ask your system administrator to make it available to the organization. If you have the appropriate permissions:
    a. In the list of reports, select the report.
    b. On the **Reports** tab, in the **Records** group, click **Edit**.
    c. On the **Actions** menu, click **Make Report Available to Organization**.
        - Put the report in a shared file system.
    - E-mail the report to other Microsoft Dynamics CRM users in the same domain.

Related Topics

Create Customer-Ready Documents and Messages....164
Running Reports and Analyzing Data....95
Write a Report Using Report-Writing Tools....112
Customizing and Organizing Reports....95

Use another report-writing tool

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Report Permissions

1. Read the online Help for the application that you are using to determine how to read external data from a Microsoft SQL Server database.
2. When selecting the data source, choose the SQL Server instance used by Microsoft Dynamics CRM and the *Organization*_**MSCRM** database.
3. Select filtered views that start with the prefix **Filtered** and any fields from the filtered views that you want in your report.

Tip
To share your new file with other users, do one of the following:

- Add your file as a report in Microsoft Dynamics CRM, and select the report. On the **Reports** tab, in the **Collaborate** group, click **Share**, and specify users with whom to share the report.
- If the report would be useful for all users, add your file as a report in Microsoft Dynamics CRM, and ask your system administrator to make it available to the organization. If you have the appropriate permissions:
    a. In the list of reports, select the report.
    b. On the **Reports** tab, in the **Records** group, click **Edit**.
    c. On the **Actions** menu, click **Make Report Available to Organization**.

- Put the report in a shared file system.

- E-mail the report to other Microsoft Dynamics CRM users in the same domain.

Related Topics

Running Reports and Analyzing Data 95
Customizing and Organizing Reports 95
Write a Report Using Report-Writing Tools 112

Edit a default report or create a SQL-based Reporting Services report

Can I do this task?

This task requires the System Administrator or System Customizer security role or equivalent permissions. More information about specific permissions and performing this task while offline: Report Permissions

The default reports in Microsoft Dynamics CRM are all SQL-based Reporting Services reports. Default reports cannot be edited with the Report Wizard. To edit the default reports other than ones created by using the Report Wizard, you need a report development environment:

How to set up a report development environment

Install the required components on your computer:

- Microsoft Visual Studio, or any product that uses the Visual Studio .NET integrated development environment (such as Microsoft Visual Basic .NET).
- Reporting Services Report Designer
- Reporting Services Report Designer 2005 can be installed from the Microsoft SQL Server 2005 CD, and requires Visual Studio .NET 2005.
- Make sure a security role assigned to your account includes the Publish Reports and Add Reporting Services Reports privileges.

In addition to the required components, the following documentation is helpful:

- *Reporting for Microsoft Dynamics CRM Using Microsoft SQL Server Reporting Services* section of the *Microsoft Dynamics CRM 2011 Software Development Kit*. More information: *Writing Reporting Services Reports (Microsoft Dynamics CRM SDK)* (see Reporting Using Microsoft SQL Server Reporting Services (Microsoft Dynamics CRM SDK) - http://go.microsoft.com/fwlink/?LinkId=199502)
- Reporting Services Books Online provides help for Reporting Services. More information: *SQL Server 2005 Reporting Services Books Online* (see <ms_SQL_Server_2008_short> Reporting Services Books Online - *http://go.microsoft.com/fwlink/?LinkId=98256*)

1. Identify the existing report that is closest in design to your new report.
2. Download the report from Microsoft Dynamics CRM to a computer that is set up with the report development environment.
   a. In the Navigation Pane, click **Workplace**, and then under **My Work**, click **Reports**.

g. On the **Reports** tab, in the **Records** group, click **Edit**.

h. On the **Actions** menu, click **Download Report**.

- The RDL file for the report contains tags that specify whether the report is a Fetch-based report or an SQL-based report.

i. Click **Save**, and specify the location in which to save the file. If you are creating a new report rather than modifying a report, rename the file.

j. In the **Download Complete** dialog box, click **Close**.

3. In a product using the Visual Studio integrated development environment (IDE), open the report, and make the required changes.

   If you are making major changes, first read *Reporting Using Microsoft SQL Server Reporting Services (Microsoft Dynamics CRM SDK)* (see Reporting Using Microsoft SQL Server Reporting Services (Microsoft Dynamics CRM SDK) - http://go.microsoft.com/fwlink/?LinkId=199502).

4. Add the report to Microsoft Dynamics CRM.

   a. In the Microsoft Dynamics CRM Reports area, click **New**.

   k. In the **Report Type** box, select **Existing File**.

   l. In the **File Location** box, click **Browse** to locate the dynamic or static file, and then click **Open**.

   m. Specify the properties for the report on the **General** tab:

   - **Name**

     The name for the report that is shown in the Reports area.

   - **Description**

     The description that is displayed in the Reports area.

   - **Parent Report**

     Displays the parent report of the current report, if one exists.

   - **Categories**

     To specify the categories to include in this report, click the **Select or change the values for this field** button, and then select the categories. More information: System Settings Dialog Box - Reporting Tab

   - **Related Record Types**

     To have the report appear in the **Reports** list on a page for specific record types, click the **Select or change the values for this field** button, and then select record types.

     For example, if your new report includes data from accounts and activities, select **Accounts** and **Activities**.

   - **Display In**

     To specify where reports should be visible, click the **Select or change the values for this field** button, and then select one or more options:

- **Reports area**

  Report will be displayed in the Reports area.

- **Forms for related record types**

  Report will be displayed on the form for the record type that you select in **Related Record Types**.

  If the report is enabled for prefiltering, from the record, users can specify running the report on the current record.

- **Lists for related records types**

  Report will be displayed from specified list view pages.

  If the report has prefiltering enabled, from the list view, users can specify running the report on selected records.

If no values are selected, the report will not be visible to end-users. To view or manage reports not visible to end-users, in the Reports area, select the **All Reports, Including Sub-Reports** view.

- **Languages**

If your Microsoft Dynamics CRM implementation has multiple languages enabled, specify a language. The report will be displayed for all users who have selected that language in their personal options. To make this report available to all users, select **All Languages**.

Note that this does not change the language used inside the report.

n. Edit the report ownership information on the **Administration** tab:

- **Owner**

The owner of the report. This option is only available if you have Assign permission for the report.

- **Viewable By**

Select **Individual** to make the report viewable only by the owner and anyone the owner shares the report with. Select **Organization** to make the report organization-owned, and to make it viewable by anyone in the organization.

o. Click **Save**.

p. To modify the filter for the report, on the Actions toolbar, click **Actions**, and then click **Edit Default Filter**.

Tips

To share your new file with other users, do one of the following:

- Add your file as a report in Microsoft Dynamics CRM, and select the report. On the **Reports** tab, in the **Collaborate** group, click **Share**, and specify users with whom to share the report.
- If the report would be useful for all users, add your file as a report in Microsoft Dynamics CRM, and ask your system administrator to make it available to the organization. If you have the appropriate permissions:

  d. In the list of reports, select the report.

  e. On the **Reports** tab, in the **Records** group, click **Edit**.

  f. On the **Actions** menu, click **Make Report Available to Organization**.

- Put the report in a shared file system.
- E-mail the report to other Microsoft Dynamics CRM users in the same domain.

- If you don't want users to run the base report you started from:
  a. In the Reports area, select the base report.
  b. In the **Records** group, click **Edit**.
  c. On the **Actions** menu, click **Revert to Personal Report**.

Related Topics

Running Reports and Analyzing Data 95
Customizing and Organizing Reports 95
Write a Report Using Report-Writing Tools 112

Create a Custom Fetch-Based Reporting Services Report

Can I do this task?

This task requires the System Administrator or System Customizer security role or equivalent permissions. More information about specific permissions and performing this task while offline: Report Permissions

All reports created by using the Report Wizard are Fetch-based reports. These reports provide basic report authoring capabilities. However, to create complex reports (such as drill-through reports or sub reports) or to change the layout and formatting of reports, create a custom Fetch-based report using the Business Intelligence Development Studio. To create a complex report, you need a report development environment:

How to set up a report development environment

Install the required components on your computer:

- Microsoft Visual Studio, or any product that uses the Visual Studio .NET integrated development environment (such as Microsoft Visual Basic .NET).
- Business Intelligence Development Studio. You can install Business Intelligence Development Studio from the Microsoft SQL Server 2008 CD. Business Intelligence Development Studio requires Visual Studio .NET 2008.
- Microsoft Dynamics CRM Report Authoring Extension

  Microsoft Dynamics CRM Report Authoring Extension can be installed from the Microsoft Dynamics CRM Server Setup DVD or from the *Download Microsoft Dynamics CRM Report Authoring Extension page* http://go.microsoft.com/fwlink/?LinkId=199124. Microsoft Dynamics CRM Report Authoring Extension is required to author Fetch-based reports by using BI Development Studio. For more information about installing Microsoft Dynamics CRM Report Authoring Extension, see *Download Microsoft Dynamics CRM Report Authoring Extension* http://go.microsoft.com/fwlink/?LinkId=199124.
- Microsoft Dynamics CRM Reporting Extensions

Microsoft Dynamics CRM Reporting Extensions can be installed from the Microsoft Dynamics CRM Server Setup DVD. Microsoft Dynamics CRM Reporting Extensions is required to create, run, and schedule Fetch-based reports in Microsoft Dynamics CRM. For more information about installing Microsoft Dynamics CRM Reporting Extensions, see the *Microsoft Dynamics CRM 2011 Implementation Guide*.

- Make sure a security role assigned to your account includes the Publish Reports and Add Reporting Services Reports privileges.

In addition to the required components, the following documentation is helpful:

- *Reporting for Microsoft Dynamics CRM Using Microsoft SQL Server Reporting Services* section of the *Microsoft Dynamics CRM 2011 Software Development Kit*. More information: *Reporting Using Microsoft SQL Server Reporting Services (Microsoft Dynamics CRM SDK)* (see Reporting Using Microsoft SQL Server Reporting Services (Microsoft Dynamics CRM SDK) - http://go.microsoft.com/fwlink/?LinkId=199502)
- Reporting Services Books Online provides help for Reporting Services. More information: *<ms_SQL_Server_2008_short> Reporting Services Books Online* (see <ms_SQL_Server_2008_short> Reporting Services Books Online - *http://go.microsoft.com/fwlink/?LinkId=98256*)

1. Open *Business Intelligence Development Studio*.
2. Create a report server project. For more information, see *How to: Create a Report Server Project* (see How to: Create a Report Server Project - http://go.microsoft.com/fwlink/?LinkId=192208).
3. In **Solution Explorer**, right-click the **Reports** folder, and then click **Add New Report**.

   The **Report Wizard** opens.
4. On the **Welcome to the Report Wizard** page, click **Next**.
5. On the **Select the Data Source** page, click **New Data Source**, and then specify the following details:
   - **Name**. Type a name for the data source.
   - **Type**. Select **Microsoft Dynamics CRM Fetch** as the data source type.
   - **Connection string**. Type the connection string for the data source.

     The connection string should be: <*ServerURL*>;<*OrganizationUniqueName*>;<*HomeRealmURL*>

     In this connection string, only <*ServerURL*> is mandatory.

     Note

     To find the organization unique name, in the Navigation Pane, click **Settings**, click **Customizations**, and then click **Developer Resources**.

     If an organization name is not specified, the first organization that the user (who is running this query) belongs to is used. If the home realm URL is not specified, the value is retrieved from the registry value "**HKLM\SOFTWARE\Microsoft\MSCRMBidsExtensions\HomeRealmUrl**".
6. Click **Next**.
7. Specify the credentials to connect to Microsoft Dynamics CRM Server 2011, and then click **OK**.

8. On the **Design the Query** page, type the Microsoft Dynamics CRM Report Authoring Extension query to use for the report.

   You can either filter records using Advanced Find in Microsoft Dynamics CRM, and use that query here, or you can write your own query. To obtain a query from Microsoft Dynamics CRM, use Advanced Find to find the records, and then click **Download Fetch XML**. Paste the query from the downloaded file in the query area.

   Note

   Microsoft Dynamics CRM Report Authoring Extension queries do not support using "Managed Property" as a data type attribute.

9. Click **Next**.
10. Select whether you want to create a tabular report or a matrix report.
11. Design the report.
12. Select a style to apply to the report, and then click **Next**.
13. Verify the the fields that you want will be included in the report, and then name the report.

    For more information about creating Fetch-based reports in Microsoft Dynamics CRM, see Create, Edit, or Copy a Report Using the Report Wizard. For detailed information about using the Report Wizard in Business Intelligence Development Studio to create reports, see *Creating a Report Using Report Wizard* (see Creating Reports with Report Designer - http://go.microsoft.com/fwlink/?LinkId=192209) and *How to: Create a Report (Reporting Services)* (see How to: Create a Report (Reporting Services) - http://go.microsoft.com/fwlink/?LinkId=192210).

14. Add the report to Microsoft Dynamics CRM.
    a. In the Microsoft Dynamics CRM Reports area, click **New**.
    b. In the **Report Type** box, select **Existing File**.
    c. In the **File Location** box, click **Browse** to locate the dynamic or static file, and then click **Open**.
    d. Specify the properties for the report on the **General** tab:

       - **Name**

       The name for the report that is shown in the Reports area.

       - **Description**

       The description that is displayed in the Reports area.

       - **Parent Report**

       Displays the parent report of the current report, if one exists.

       - **Categories**

       To specify the categories to include in this report, click the **Select or change the values for this field** button , and then select the categories. More information: System Settings Dialog Box - Reporting Tab

       - **Related Record Types**

To have the report appear in the **Reports** list on a page for specific record types, click the **Select or change the values for this field** button , and then select record types.

For example, if your new report includes data from accounts and activities, select **Accounts** and **Activities**.

- **Display In**

To specify where reports should be visible, click the **Select or change the values for this field** button , and then select one or more options:

- **Reports area**

  Report will be displayed in the Reports area.

- **Forms for related record types**

  Report will be displayed on the form for the record type that you select in **Related Record Types**.

  If the report is enabled for prefiltering, from the record, users can specify running the report on the current record.

- **Lists for related records types**

  Report will be displayed from specified list view pages.

  If the report has prefiltering enabled, from the list view, users can specify running the report on selected records.

If no values are selected, the report will not be visible to end-users. To view or manage reports not visible to end-users, in the Reports area, select the **All Reports, Including Sub-Reports** view.

- **Languages**

If your Microsoft Dynamics CRM implementation has multiple languages enabled, specify a language. The report will be displayed for all users who have selected that language in their personal options. To make this report available to all users, select **All Languages**.

Note that this does not change the language used inside the report.

e. Edit the report ownership information on the **Administration** tab:

- **Owner**

The owner of the report. This option is only available if you have Assign permission for the report.

- **Viewable By**

Select **Individual** to make the report viewable only by the owner and anyone the owner shares the report with. Select **Organization** to make the report organization-owned, and to make it viewable by anyone in the organization.

f. Click **Save**.

g. To modify the filter for the report, on the Actions toolbar, click **Actions**, and then click **Edit Default Filter**.

Tips

To share your new file with other users, do one of the following:

- Add your file as a report in Microsoft Dynamics CRM, and select the report. On the **Reports** tab, in the **Collaborate** group, click **Share**, and specify users with whom to share the report.
- If the report would be useful for all users, add your file as a report in Microsoft Dynamics CRM, and ask your system administrator to make it available to the organization. If you have the appropriate permissions:
    a. In the list of reports, select the report.
    b. On the **Reports** tab, in the **Records** group, click **Edit**.
    c. On the **Actions** menu, click **Make Report Available to Organization**.
    - Put the report in a shared file system.
    - E-mail the report to other Microsoft Dynamics CRM users in the same domain.
- If you don't want users to run the base report you started from:
    a. In the Reports area, select the base report.
    b. In the **Records** group, click **Edit**.
    c. On the **Actions** menu, click **Revert to Personal Report**.

Related Topics

Running Reports and Analyzing Data 95
Customizing and Organizing Reports 95
Write a Report Using Report-Writing Tools 112

Run a Report

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Report Permissions

1. Find and open a report:

   From the Reports area

   - In the **Workplace**, under **My Work**, click **Reports**.
   - To narrow the list, enter the first few letters of the report name, or use the asterisk (*) wildcard in the **Search** box and then click the **Find** button . You can also select a view.
   - In the reports list, double-click the report that you want to run.
   - If the report has a default filter, the default filter will be displayed. Follow step 2 to change the filter.

   Tip: To run a report without seeing the default filter, select the report, and then on the Actions toolbar, click **Actions**, and then click **Run Report**.

   From a list of records, including the results of an Advanced Find search

Only reports that relate to the current record type will be available.

You can run some reports on all records in the list, up to ten selected records, or without limiting the records as if you were running the report from the Reports area.

- To run a report on all records on the list:

a. On the Actions toolbar, click **Reports** .

b. Under **Run on Selected Records**, click the name of the report.

c. In the **Select Records** dialog box, click **All records on all pages in the current view**, and then click **Run Report**.

- To run a report on up to ten selected records from the list:

a. Select the records to include. Select several records by pressing the CTRL key while you click each record.

b. On the Actions toolbar, click **Reports**.

c. Under **Run on Selected Records**, click the name of the report.

d. In the **Select Records** dialog box, click **The selected records**, and then click **Run Report**.

- To run a report without limiting records to items on the list:

a. On the Actions toolbar, click **Reports**.

b. If the report is listed under **Run on All Records**, select the report.

- OR -

Under **Run on Selected Records**, click the name of the report. In the **Select Records** dialog box, click **All applicable records**, and then click **Run Report**.

- OR -

If the report you want to run is not listed, you must go to the Reports area to run the report.

From a record

Only reports that relate to the current record type will be available.

To run a report including data from just one record:

a. On the second tab, in the **Data** group, click **Run Report**.

b. Under **Run on Current Record**, click the name of the report.

From Microsoft Dynamics CRM for Outlook

All reports can be run when you are online.

To run a report while you are offline, you must first create a local data group that includes the report, as well as a local data group that includes any data that should be included in the report.

To create a local data group that contains reports, on the **CRM** menu, click **Modify Local Data Groups**, click **New**, select the the **Report** record type, and then define the criteria for which reports to include. More information: Work with Data to Take Offline

- To run reports from the Reports area, in the Outlook Navigation Pane, under **Microsoft Dynamics CRM**, click **Workplace**, click **My Work**, click **Reports**, and then select a report to run.
- To select a report from a record or list, follow the procedures above. These steps work the same way in Microsoft Dynamics CRM for Outlook.
- From a report you saved locally
- If you have saved a report on your computer or shared file system that reads dynamic data from Microsoft Dynamics CRM, to open it, browse to the folder that contains your saved report, and double-click the file.

2. If the report offers filter criteria, if needed, modify the filter criteria and then click Run Report.

   The list of existing report filtering criteria is grouped by record types that you can use in the filter, such as **Accounts** or **Contacts**. To edit a parameter in simple mode, click the underlined value and enter a new value.

   - OR - To edit the filter criteria in detailed mode:

   a. Click **Edit Filter**.

   b. To add a criteria row:

      1. Click **Select**, and specify the field to filter on.
      2. Click the query relational operator, and select an operator.
      3. Click **Enter Value**, and enter a value to filter on. For some values, you can click the **Select or change the values for this field** button to open the **Select Values** dialog box and select the value you want.

   c. To group criteria, you must select two or more rows for the same record type. For example, **Sales Stage** and **Est. Revenue** are both field values in the **Opportunity** record type and two rows that specify filter criteria for these fields can be grouped. However, rows with field values from different record types, such as **Account** and **Opportunity** record types, cannot be grouped.

      1. For each row you want to group, in detailed mode, click the **Options menu** button for that row, and then click **Select Row**.
      2. On the Filter toolbar, select **Group AND** or **Group OR**.
      3. To remove a row from a group, click the **Options menu** button for that row, and then click **Delete**.
      4. To select a group, click the **Options menu** button for that group, and then click **Select Group**.
      5. To add a criteria clause to a group, click the **Options menu** button for that group, click **Add Clause**, and then select the field, query relational operator, and value.
      6. To unselect a group that has been previously selected, click the **Options menu** button for that group, and then click **Deselect Group**.
      7. To ungroup a group, click the **Options menu** button for that group, and then click **Ungroup**.
      8. To change a **Group AND** group to a **Group OR** group, or a **Group OR** group to a **Group AND** group, click the **Options menu** button for that group, and then click **Change to OR** or **Change to AND**.

Tips

- To clear all criteria and start over, on the Filter toolbar, click **Clear**, and then click **Confirm**.
- To delete a row, click the **Options menu** button for that row, and then click **Delete**.
- To hide a row in simple mode, while you are in detailed mode, click the **Options menu** button for that row, and then click **Hide in Simple Mode**.
- If you have a hidden row when viewing filter criteria in simple mode and you want to show that row again, then in detailed mode, you must click the **Options menu** button for that row, and then click **Show in Simple Mode**.
- You can set your personal options so that report filters and Advanced Find criteria always open in simple or detailed mode. More information: *Set Personal Options* (on page 201)

3. If the report offers parameters, if needed, modify the parameters and then click **View Report**.
4. Locate data in the report.
   - To view or change a record, click the first field in the row for the record. A separate Microsoft Dynamics CRM window will open with the record.
   - To view all records associated with a summary or chart report, click **Show All** at the bottom of the report. To navigate back to the original report, click the **Go back to the parent report** button .
   - To view detailed information about an area in a chart, click an area of the chart. To navigate back to the original report, click **Original Report** in the report title area.
   - To page through the report, on the Report toolbar, use the **Page Navigation** buttons. To locate a specific page, type a page number in the box and then press **Enter**.
   - To quickly locate specific information in your report, in **Find** | **Next**, type a few characters, and then click **Find**.
   - To sort a column, click the column title. The direction of sorting is indicated by the **Ascending sort** button or the **Descending sort** button .
   - To view or hide the filter summary, expand or collapse **Filter Summary**.
   - To update your report, click the **Refresh** button .
   - To hide or show the report parameters, click the **Show** / **Hide Parameters** button .
5. Print the report.

   On the Report toolbar, click the **Print** button .

   If you are working offline using Microsoft Dynamics CRM for Outlook, on the Report toolbar, click the **Export** button , and select **MHTML (web archive)** format. Open the file, and on the **File** menu, click **Print**.

   Tips

   - If a chart doesn't display the first time you export a report to **MHTML (web archive)** format, export the report a second time.

- To print reports, you need a Reporting Services Microsoft ActiveX control. The first time you print a Reporting Services report from either Microsoft Dynamics CRM or Microsoft Dynamics CRM for Microsoft Office Outlook, you will see a prompt **Do you want to install this software?**.

To install the required control, click **Install**.

6. Export the report.

Important

The exported report is temporary. If you need to save the exported report to a local file, use the viewing program to save the file to disk. The saved exported report is no longer connected to Microsoft Dynamics CRM. Therefore, it does not change if Microsoft Dynamics CRM data changes.

a. Click the **Export** button and select a format to which you want to export the report.

A second browser window is used to display the report, using a viewer associated with the export format you selected.

The formats that are available are determined by the rendering extensions that are installed on the Microsoft SQL Server Reporting Services report server, and also by whether you are online or offline.

- If you are working offline, only the **Excel** and **Acrobat (PDF) file** formats are available.

If a viewer is not available for the format you select, you must select a different format or install the viewer.

The following export formats are included in a default installation when you are online. The list of export formats available to you may vary from those listed here.

- **XML file with report data**

  View the report as an XML file.

- **CSV (comma delimited)**

  View the report as a text file, with fields separated by commas. This format includes all the row, column, and field labels.

  To export only the data, instead of using this format, export data from any list in Microsoft Dynamics CRM, including results of Advanced Find searches, into Microsoft Office Excel, and then save as a comma-delimited (CSV) file.

- **Acrobat (PDF) file**

  View the report using a client-side PDF viewer. You must have Adobe Acrobat Reader to use this format.

  Choose this format for long reports, paginated reports, or reports that are delivered as a file.

- **MHTML (web archive)**

  View the report in Microsoft Internet Explorer, as a MIME-encoded HTML format that keeps images and linked content together with a report. For chart reports, if the chart is not displayed correctly the first time that you export the report, export the report again.

  Choose this format to view a report offline or for e-mailing the report.

- **Excel**

View the report in Microsoft Office Excel. This format includes all the row, column, and field labels, in addition to report formatting.

Large reports and reports with charts might not display with the expected formatting when exported in this file format. To export only the data, instead of using this format, from any list in Microsoft Dynamics CRM, including results of Advanced Find searches, export the data into Microsoft Office Excel, and then save as a comma-delimited (CSV) file. More information: *Export Data to Excel* (on page 61)

- **TIFF file**

  View the report in the default TIFF viewer. For some Windows clients, this is the Windows Pictures and Fax Viewer.

  Choose this format to a view a report in a page-oriented layout. The TIFF format is the recommended format for printing reports.

- **Word**

  View the report in Microsoft Office Word. This format includes all the row, column, and field labels, in addition to report formatting.

Tips

- If there is no report that gives you the information you need, you can either export data to Microsoft Office Excel, or create your own report. More information: *Export Data to Excel* (on page 61), Create and Work with Reports
- If a snapshot of a Reporting Services report exists, you can view it from the Reports area. To see if any snapshots exist for a report, click the **View Snapshots** button next to the report. If a snapshot exists, click the snapshot link to view the snapshot.

Note

If multiple Language Packs are installed, only reports that are marked for display in the language you specified in Personal Options will be visible. More information: *Set Personal Options* (on page 201)

Related Topics

Print Things 19
Running Reports and Analyzing Data 95
Customizing and Organizing Reports 95
Export Data to Excel 61
Default Reports 97

Edit the default filter for a report

Can I do this task?

For personal reports, this task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Report Permissions.

For reports available to everyone in your organization, this task requires the System Administrator security role, System Customizer security role, or equivalent permissions. More information about specific permissions and performing this task while offline: Report Permissions.

If a report is a Microsoft SQL Server Reporting Services report, is enabled for prefiltering, and has a default filter, you can change the default filter that will be used each time any user runs the report.

1. In the Navigation Pane, click **Workplace**, and then under **My Work**, click **Reports**.
2. Select a report.

   To see all reports, including sub-reports that are not visible in the default view, select the All Reports, Including Sub-Reports view.
3. In the **Actions** group, click **Edit Default Filter**.
4. Modify the filter criteria.

   The criteria are grouped by record types that you can use in the filter, such as **Accounts** or **Contacts**.

   - To edit an existing row, click the query relational operator and select an operator, or click the underlined value and enter a new value.
   - Click the query relational operator, and select an operator.
   - To add a criteria row:

   a. Click **Select**, and specify the field to filter on.

   b. Click the query relational operator, and select an operator.

   c. Click **Enter Value**, and enter a value to filter on. For some values, you can click the **Select or change the values for this field** button to open the **Select Values** dialog box and select the value you want.

   - To group criteria, you must select two or more rows for the same record type. For example, **Sales Stage** and **Est. Revenue** are both field values in the **Opportunity** record type and two rows that specify filter criteria for these fields can be grouped. However, rows with field values from different record types, such as **Account** and **Opportunity** record types, cannot be grouped.

   a. For each row you want to group, in detailed mode, click the **Options menu** button for that row, and then click **Select Row**.

   b. On the Filter toolbar, select **Group AND** or **Group OR**.

   b. To remove a row from a group, click the **Options menu** button for that row, and then click **Delete**.

   c. To select a group, click the **Options menu** button for that group, and then click **Select Group**.

   d. To add a criteria clause to a group, click the **Options menu** button for that group, click **Add Clause**, and then select the field, query relational operator, and value.

   e. To unselect a group that has been previously selected, click the **Options menu** button for that group, and then click **Deselect Group**.

   f. To ungroup a group, click the **Options menu** button for that group, and then click **Ungroup**.

g. To change a **Group AND** group to a **Group OR** group, or a **Group OR** group to a **Group AND** group, click the **Options menu** button for that group, and then click **Change to OR** or **Change to AND**.

Tips

- To clear all criteria and start over, on the Filter toolbar, click **Clear**, and then click **Confirm**.
- To delete a row, click the **Options menu** button for that row, and then click **Delete**.

5. Click **Save Default Filter**.

Related Topics

Customizing and Organizing Reports 95

Create one-time or scheduled report snapshots

Can I do this task?

For personal reports, this task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Report Permissions.

For reports available to everyone in your organization, this task requires the System Administrator security role, System Customizer security role, or equivalent permissions. More information about specific permissions and performing this task while offline: Report Permissions.

To create a snapshot of a Reporting Services report, you create a snapshot definition, which can be used to create on-demand snapshots or to schedule snapshots to occur at specific times. Each snapshot definition can create and store up to eight snapshots. Creating the ninth snapshot automatically deletes first snapshot. **Caution:** When you make a snapshot available to other users, all the data in the snapshot is visible, whether or not the other users have permission to view this data directly in Microsoft Dynamics CRM. Make sure you do not share information that other users do not have permission to view.

1. In the Navigation Pane, click **Workplace**, and then under **My Work**, click **Reports**.
2. Select a report.
3. On the **Reports** tab, in the **Actions** group, click **Schedule Report**, and then complete the steps in the wizard.

Tips

- After you create a snapshot definition, rename the snapshot definition so that users can easily understand the purpose of the snapshot.
    a. Select the snapshot definition, and then on the Actions toolbar, click **Edit Report**.
    b. In the **Name** box, enter a new name, and then click **Save and Close**.
- After you have created snapshots, if you don't want users to be able to run the base report:
    a. In the Reports area, select the base report.
    b. In the **Records** group, click **Edit**.

c. On the **Actions** menu, click **Revert to Personal Report**.

Related Topics

Customizing and Organizing Reports 95

Make a report available for external use

Can I do this task?

This task requires the System Administrator or System Customizer security role or equivalent permissions. More information about specific permissions and performing this task while offline: Report Permissions

When you publish a report for external use, it is available for use in a Microsoft SharePoint Web part or in a custom program. In addition, you can use Microsoft SQL Server Reporting Services to work with this report.

1. In the Navigation Pane, click **Workplace**, and then under **My Work**, click **Reports**.
2. Select the report that you want to make available for external use.
3. On the **Reports** tab, in the **Records** group, click **Edit**.
4. On the **Actions** menu, click **Publish Report For External Use**.

Related Topics

Customizing and Organizing Reports 95

Report Ownership

System reports are available to all users. Reports owned by individual users can be shared with specific colleagues or teams, or can be made available to the organization so that all users can use them.

Charts present your organization's data graphically. Data presented in charts can quickly give you insight into large quantities of data that is spread across different areas of your business. This helps you make relevant and timely decisions.

Microsoft Dynamics CRM associates charts with record types. It generates charts using the data in the list of records for any record type. For example, if you create a chart from the list of account records, the Chart Designer shows you only the fields for the Account record type. Multiple charts can be created for a record type. But, you can see only one chart at a time for a record type.

Because charts are created in the context of a list of records, changing the view of a list also changes the chart. Filtering a list of records changes the chart to show the filtered data. Similarly, drilling down in a chart updates the list of records to show the new data.

Creating charts in Microsoft Dynamics CRM

Microsoft Dynamics CRM supports two types of charts.

- **System Charts.** These are available to all users in the organization.

- **User Charts.** These are available to those with whom a chart has been shared or assigned. Sharing can be by users or by teams.

More information: *Work with User Charts ./help/ui_viz_work_with_charts.htm*, Work with System Charts

The Chart Designer in Microsoft Dynamics CRM helps you create the following different form of charts:

- Column
- Bar
- Line
- Pie
- Funnel

To create a chart, specify fields to be displayed on the category and series axes. Typically, the category axis displays data from numeric or non-numeric fields. The series axis displays data from numeric fields.

The Chart Designer supports creating only single-series charts. To create multi-series charts or comparison charts, use Microsoft Dynamics CRM SDK.

To change a chart or create a new chart from another chart, export an existing chart, change the chart's definition file, and then import the changed definition file back to Microsoft Dynamics CRM. More information: *View Data using Charts (Microsoft Dynamics CRM SDK)* http://go.microsoft.com/fwlink/?LinkId=191610.

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Chart Permissions

1. On the main page of the list of records, on the **Charts** tab, in the **Charts** group, click **New Chart**.

   - OR -

   To edit an existing chart, click the charts bar on the right or top of the list of records. Click the arrow next to the chart name. In the list, click the name of the chart that you want to edit, and then on the **Charts** tab, in the **Charts** group, click **Edit Chart**.

2. Format the chart.

   The purpose of this step is to specify the type of chart, and how the data is displayed in the chart.

   1. Select the chart type.

      The **Chart preview** area shows how the data will be displayed.

   2. Specify which data to display on each axis:

      - In **Legend Entries (Series)**, select the field to use for the X axis, and the label that is displayed on the chart for the field.
      - In **Aggregate**, select the option by which you want to group the field you selected in **Legend Entries (Series)**.

        Note

        For numeric fields, you can select any aggregate options. For non-numeric fields, **Count: All** is selected by default and you cannot change it.

- In **Category**, select the field to use for the Y axis and the label that is displayed on the chart for the field.
- For fields that are of datetime type, select the option by which you want to group the field you selected in **Category**.

Based on your **Legend Entries (Series)** and **Category** selection, the chart name is populated.

3. If you want to specify a different name for the chart, click the chart name to edit it.
4. Type a useful description to identify the purpose of the chart.
5. To save the chart and close the designer, on the **Design** tab, in the **Save** group, click **Save and Close**.

   - OR -

   To close the chart without saving it, on the **Design** tab, in the **Close** group, click **Close Designer**.

Note

The chart obtains the data from the view that is selected for a record type. A chart automatically gets updated every time that you change the view in the list of records. However, if the chart has been idle for some time, we recommend that you click **Refresh Chart** on the **Charts** tab so that the chart and the list of records show the synchronized data.

Important

You can create and attach charts to only those record types in Microsoft Dynamics CRM that support the new ribbon interface in the Web application. This is because all of the chart controls are only present in the ribbon interface of Microsoft Dynamics CRM. For more information, see Charts (Visualizations) for Microsoft Dynamics CRM in the *Microsoft Dynamics CRM Software Development Kit* (see Microsoft Dynamics CRM Software Development Kit - *http://go.microsoft.com/fwlink/?LinkId=97596*).

Related Topics

View charts and analyze data 142

View charts and analyze data

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Chart Permissions

You can view the charts from the main list of records or from the list of associated records for an individual record. For example, you can view a chart for a list of account records. Otherwise, you can view a chart for the Opportunity line item of any account record.

To view a chart for a list of associated records, open a record, click the line item of the associated record type, on the <*record type*> tab, click **Charts**, and then click **Right**. For example, open an account record, and under **Sales**, click **Opportunities**. On the **Opportunities** tab, click **Charts**. If there is an existing chart

created for this associated record type, the chart will be displayed to the right of the list of the associated records.

Note
A chart will not display if you select the **Related Regarding Records** filter from the **Include** drop-down box for a list of associated records.

When you are viewing charts in context of the list of records, you can apply filters on the list of records, or you can drill down in a chart:

1. On the main page of the list of records, click the chart bar on the right or top of the list of records.
2. In the charts area, click the arrow next to the chart name, and then click the name of the chart that you want to view from the list of charts.

   The chart preview changes depending on the view that you selected.
3. Analyze the data in the chart.

   You can either apply a filter on the list to view an updated chart of the narrowed down items or you can drill down in a chart to obtain specific details about an item.

   When you drill down in a chart, the data in the list of records is filtered automatically based on the drill-down options you provide:

   - **Apply filter**

   1. On the main page of any list of records, click the name of the view to use to generate the chart from the <*record type*> list.
   2. To see a chart for the record type, click the chart bar on the right or top of the list of records.
   3. Click the arrow next to the chart name, and then click the name of the chart that you want to see.
   4. On the **View** tab, in the **List** group, click **Filter**.
   5. On the column on which you want to apply a filter, click the **Filter** button, and then click one of the default filters for the column or click **Custom Filter**.

      If you clicked **Custom Filter**, specify criteria for the filter.

      a. In the **Custom Filters** dialog box, click one of the default query operators from the first list.

   h. In the next box, enter a value for the query operator.

   i. Click one of the default query operators from the second list.

   j. In the box next to the second list, enter a value for the query operator for the second criteria.

   k. Depending on whether you want both these criteria to be met, click **And** or **OR**.

   l. Click **OK**.

   6. In the chart area, click **Refresh Chart**.

      The chart is refreshed, and the updated data obtained from the view and list is displayed in the chart.

      Note

      When you change the layout of a chart, all the filters applied on the view are reset. To retain the filters, save the view as a new view before you change the layout.

Drill down in a chart

1. Open the list of records that you want to view a chart. Then, click the chart bar on the right or top of the list of records.
2. In the chart area, click the arrow next to the chart name, and then click a name of the chart that you want to see or for drilling down.
3. Click the category area of the chart in which you want to drill down further to see lower level data.
4. In the shortcut menu, click **Select Field**, and then click the field by which you want to group the category.

   For example, you are viewing a chart that shows opportunities by potential customers. You want to drill down to see the opportunities for one potential customer, grouped by probability. Click the potential customer on the chart, click **Select Field**, and then click **Probability**. The chart now shows the opportunities for this customer with the probability of each opportunity.
5. Click the corresponding icon for a chart type that you want use for viewing the data.
6. Click **OK**.

You can drill down even further on the resulting chart from the drill down on a chart.

Note

To go to the chart from which you drilled down, click **Back**.

Important

- You cannot drill down in a chart if you cannot search on the field that you specified for the category axis. A quick way to find whether you can search on a field is to click Advanced Find, click the record type for the chart that you are viewing in the **Look for** drop-down box, and then click **Select**. If a field is not listed in this list, you cannot search on the field.
- You can drill down in only the charts that are of the following type: Bar, Column, Line, Pie, Funnel. If you imported a custom chart of a different type, you will not be able to drill down in the chart.
- You cannot drill down in chats that you are viewing from a list of associated records.

Note

- To place the chart on the right or on top of a list of records, on the **Charts** tab, in the **Layout** group, click **Chart Pane**, and then click **Right** or **Top**. To close the chart pane, on the **Charts** tab, in the **Layout** group, click **Chart Pane**, and then click **Off**.
- In any list of records, to collapse a chart pane that is placed on the right of a list of records, click the **Click here for Collapsed View** button . To open the chart pane, click the **Click here for Normal View** button .

Can I do this task?

This task requires the System Administrator or System Customizer security role or equivalent permissions. Customization tasks can be performed only while you are online. More information: *Customization Permissions* (on page 490)

You cannot delete a user chart if the chart is assigned to another user or team.

1. On the main page of the list of records, click the chart bar on the right or top of the list of records.
2. Click the arrow next to the chart name, and then in the list, click the name of the chart that you want to delete.
3. On the **Charts** tab, in the **Charts** group, click **Delete Chart**.
4. In the **Confirm Chart Deletion** dialog box, click **OK**.

Can I do this task?

This task requires the System Administrator or System Customizer security role or equivalent permissions. More information about specific permissions and performing this task while offline: Chart Permissions

You cannot create complex visualizations such as multi-series charts or comparison charts by using the Microsoft Dynamics CRM Web application. To create complex charts, export the chart, edit the chart definition file, and then import it back into Microsoft Dynamics CRM.

1. In the Navigation Pane, click **Settings**.
2. Under **Customization**, click **Customizations**.
3. In the **Customization** area, click **Customize the System**.
4. Expand the name of the entity that has the chart that you want to export, and then click **Charts**.
5. Select the chart that you want to export and on the Actions toolbar, click **Actions**, and then click **Export Chart**.
6. To open the exported chart definition file, click **Open**.

   - OR -

   To save the file, click **Save**.

Can I do this task?

This task requires the System Administrator or System Customizer security role or equivalent permissions. More information about specific permissions and performing this task while offline: Chart Permissions

You cannot create complex visualizations such as multi-series charts or comparison charts by using the Microsoft Dynamics CRM Web application. To create complex charts, export the chart, edit the chart definition file, and then import it back into Microsoft Dynamics CRM.

1. In the Navigation Pane, click **Settings**.
2. Under **Customization**, click **Customizations**.
3. In the **Customization** area, click **Customize the System**.
4. Under **Components**, expand **Entities**.
5. Expand the name of the entity to which you want to import the chart, and then click **Charts**.
6. On the Actions toolbar, click **Actions**, and then click **Import Chart**.
7. On the **Import Chart** dialog box, click **Browse** to select the definition file of the chart that you want to import, and then click **OK**.

Note

When you import the definition file, Microsoft Dynamics CRM checks the chart definition file for the chart ID, chart name, and the file name in the same order.

If a chart with the same ID already exists in Microsoft Dynamics CRM, you are given the option either to replace the existing chart with a file or to save the chart that you are importing with a new name. If an ID is not specified in the chart definition file, Microsoft Dynamics CRM checks to see if a chart with the same name already exists. If a chart exists with the same name, you are given the option either to replace the existing chart or to save the chart that you are importing with a new name. If both ID and name are not specified, Microsoft Dynamics CRM checks to see if there is a chart with the name same as the file name. If a chart exists with the same name, you are given the option either to replace the existing chart or to save the chart that you are importing with a new name.

If there are two or more existing charts with the same name, you can only import a chart with a new name.

Assign a user chart

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Chart Permissions

You can assign any user chart to other users or teams in your organization.

1. On the main page of the list of records, click the chart bar on the right or top of the list of records.
2. In the charts area, click the arrow next to the chart name, and then click the name of the chart that you want to view from the list of charts.
3. On the **Charts** tab, in the **Collaborate** group, click **Assign**.
4. In the **Assign User Chart** dialog box, click:
   - **Assign to me**

     Use this option to assign the record to yourself.

     - OR -
   - **Assign to another user or team**

     1. Click the **Lookup** button .
     2. In the **Look Up Records** dialog box, in the **Look for** box, select **User** or **Team**.
     3. In the **Search** box, type all or part of the user's name or team's name and, click the **Find** button .
     4. Double-click the user's name or team's name, and click **OK**.
5. Click **OK**.

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Chart Permissions

You can share a user chart with other users or teams in your organization.

1. On the main page of the list of records, click the chart bar on the right or top of the list of records.
2. Click the arrow next to the chart name, and then click the name of the chart that you want to share in the list.
3. On the **Charts** tab, in the **Collaborate** group, click **Share**.
4. Select a user or team you want to share your chart with. More information: Share a record

Make a copy of an existing system or user chart

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Chart Permissions

To use an existing chart as a base for creating another chart, make a copy of the existing chart. You can save a user chart and a system chart as a user chart. Also, you can assign or share this chart with other users or teams in your organization.

1. On the main page of the list of records, click the chart bar on the right or top of the list of records.
2. Click the arrow next to the chart name, and then click the name of the chart that you want to copy in the list.
3. On the **Charts** tab, in the **Charts** group, click **Save As**.
4. Specify a name and a description for the new chart, and then click **OK**.

Using dashboards

Dashboards in Microsoft Dynamics CRM provide an overview of business data. Act on information that is spread across the organization from one place.

Create dashboard components that help you to dig out and analyze important data.

Types of dashboards

You can create two types of dashboard in Microsoft Dynamics CRM:

- **User dashboards.** An individual user owns a user dashboard. It can be assigned to other users or teams. A user dashboard can be set as the default dashboard for individual users. User dashboards override system dashboards.
- **System dashboards.** A system dashboard is available to all users in the organization. It can be set as a default dashboard for the organization, but could be overridden by a user dashboard. Importing, exporting, or uninstalling a solution applies, the relevant actions on the dashboards.

Dashboards components

Create new dashboards based on the default layouts in the dashboard designer.

- **Charts.** A system (organization-owned) dashboard only contains system charts. A user dashboard can contain system charts and user charts. More information: *Understanding Charts* (on page 140), *Work with Charts ./help/ui_viz_work_with_charts.htm*, Work with System Charts
- **Lists.** A system dashboard only contain lists that use public views to retrieve the data. A user dashboard can contain a list that uses public views and saved views. More information: Create and Configure Views, Work with saved views.
- **IFrames.** A system dashboard restricts or allows cross-frame scripting for an iFrame. A user dashboard restricts cross-frame scripting for all iFrames. More information: Add or edit an IFrame.
- **Web Resources.** Add the HTML, Silverlight (.xap), and images (.jpeg or .jpg, .png, and .gif) Web resources. More information: *Microsoft Dynamics CRM Software Development Kit* http://go.microsoft.com/fwlink/?LinkId=191610.

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Dashboard Permissions

Can I do this task?--System Dashboard

This task requires the System Administrator or System Customizer security role or equivalent permissions. More information about specific permissions and performing this task while offline: Dashboard Permissions

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Dashboard Permissions

1. In the Navigation Pane, click **Workplace**. Then, under **My Work**, click **Dashboards**.
2. In the **Dashboard Management** group, click **New**.

   Dashboard Layouts opens.
3. Select a layout as a starting point to design your dashboard.

   Dashboard layouts are comprised of one or more tabs. A tab can be expanded or collapsed. Each tab can contain one or more sections.

   Note

   All the default layouts, except the **4-Column Overview Dashboard** layout and the **3-Column Overview Dashboard** layout, have a single tab and a single section. You cannot add or delete a tab or a section in a dashboard by using the Dashboard designer. If you want to have multiple tabs or sections in your dashboard, export the dashboard, customize it, and import it back into Microsoft Dynamics CRM. For more information, see Microsoft Dynamics CRM Software Development Kit documentation.

   Select one of the six default layouts in order to create your dashboard:

   - **3-Column Regular Dashboard**. This has one tab and one section. This layout can accommodate components across three columns.
   - **3-Column Multi-Focused Dashboard**. This has one tab and one section. This layout can accommodate components across three columns. Use this layout to draw focus on specific components.

- **4-Column Overview Dashboard**. This has two tabs and two sections. You can expand or collapse each of the tabs in the dashboard. This layout can accommodate components across four columns. In this layout, the section in the bottom row spans across four columns, allowing this column to be used to insert a list of records that has several columns (fields), or to insert a horizontal chart.
- **2-Column Regular Dashboard**. This has one tab and one section. This layout can accommodate components across two columns.
- **3-Column Overview Dashboard**. This has two tabs and two sections. You can expand or collapse each of the tabs in the dashboard. This layout can accommodate components across three columns. In this layout, the column in the bottom row spans across three columns, allowing this column to be used to insert a list of records that has several columns (fields), or to insert a horizontal chart.
- **3-Column Focused Dashboard**. This has one tab and one section. It accommodates components across three columns.

Note

- By default for any layout, you can only add up to six components. This limit can be changed.
- In any layout, you can increase or decrease the height or width of a component only up to a limit:
  - You can decrease the width of a component to a minimum of one column.
  - You can decrease the height of a component to a minimum of six rows.
  - You can increase the width of a component to the number of columns in that layout. For example, if you are using the **3-Column Regular Dashboard**, you can increase the width of a component up to three columns (by two more columns).
  - You can increase the height of a component to a maximum of 250 rows.

The right pane shows the appearance of the new dashboard based on the layout selected in the left pane.

4. Click **Create**.

   The dashboard designer opens with empty columns based on your layout selection.

5. In the **Name** box, type a descriptive and useful name for your dashboard.
6. Add different components that you want to be displayed on your dashboard:
   - Chart

1. In the **Insert** group, click **Chart**.

   - OR -

   In an empty component area, click the **Chart** button .

2. In the **Component Designer** dialog box, specify the following information:
   - **Record Type**. Click the record type to use for the chart that you want to add to the dashboard.
   - **View**. Click the view to use for the data in the chart. The **View** drop-down box has the associated views for the chosen record type.
   - **Chart**. Click the type of chart that you want to insert. The **Chart** drop-down box has the associated charts for the chosen record type.

The chart preview changes based on your choice of the record type, view, and chart.

3. Click **OK**.

Note

You can add only system charts in a system dashboard. A user dashboard can contain system charts and user charts.

- List

1. In the **Insert** group, click **List**.

- OR -

In the empty component area, and click the **List** button .

2. In the **Component Designer** dialog box, specify the following information:
   - **Record Type**. Click the record type for the list that you want to add to the dashboard.
   - **View**. Click a view to use for the data for the list. Only views that are associated to the selected record type are in the **View** drop-down box.
3. Click **OK**.

- IFrame

1. In the **Insert** group, click **IFrame**.

- OR -

In the empty component area, click the **IFrame** button .

2. In **Add an IFRAME**, enter the following information:
   - **Name**. Type a unique name for the IFrame. The name can only contain alphanumeric characters and the underscore character.
   - **URL**. Type the full URL for the IFrame. You may select the check box. More information: *Passing Parameters to an IFRAME (Microsoft Dynamics CRM SDK)* (see Passing IFRAME parameters (Microsoft Dynamics CRM SDK) - http://go.microsoft.com/fwlink/?LinkId=201317)
   - **Label**. Specify a label for the IFrame.

     To display this label on the form, select the **Display label on the form** check box.
   - **Visibility**. Select the **Visible by default** check box if you want the IFrame to be visible in the Web application and the Microsoft Dynamics CRM for Outlook reading pane.

Caution

Applications can interact with each other through an IFrame. The **Restrict cross-frame scripting** check box is selected by default for security purposes. When the check box is selected, it blocks running scripts in the IFrame.

More information: Add or edit a form IFRAME.

Note

If you are using Microsoft Dynamics CRM 4.0 for Outlook, some URLs added by using an IFrame may show script errors during dashboard loading. These script errors may also obstruct the charts

from loading. However in Microsoft Dynamics CRM 2011 for Outlook, you can limit the script errors by selecting the **Restrict cross-frame scripting** check box.

3. Click **OK**.

- Web resource

1. In the **Insert** group, click **Web Resource**.

   - OR -

   In the empty component area, click the **Web Resource** button .

2. In **Add Web Resource**, specify the following information:

   - **Web Resource**. Click the **Lookup** button , and then in the **Look Up Record** dialog box, select the Web resource that you want to add to the dashboard, and then click **OK**.

   Note

   In a dashboard, you can only add Web resources of the following types: HTML, Silverlight, PNG, GIF, JPEG, ICO.

   - **Name**. Type a unique name for the Web resource. The name can only contain alphanumeric characters and the underscore character.
   - **Label**. Type a label for the Web resource. To display this label on the form, select the **Display label on the form** check box.
   - **Visibility**. Select the **Visible by default** check box if you want the Web resource to be visible in the Web application and the Microsoft Dynamics CRM for Outlook reading pane.
   - If you want to provide the target application with information about the context of the Web resource, select the **Pass record object-type code and unique identifier as parameters** check box. More information: *Passing Parameters to an IFRAME (Microsoft Dynamics CRM SDK)* (see Passing IFRAME parameters (Microsoft Dynamics CRM SDK) - http://go.microsoft.com/fwlink/?LinkId=201317).

   For more information about adding a Web resource, see Add or edit a form Web resource.

3. Click **OK**.

7. To change the dashboard properties, in the **Action** group, click **Dashboard Properties**. Type the name and description for the dashboard, and then click **OK**.

8. To make changes to a component that you have added to the dashboard designer, select the component, and in the **Action** group, click **Edit Component**. Verify the details or make changes, as required.

   For an IFrame, see information about editing an IFrame.

   For a web resource, see information about editing a web resource.

   For a chart or list component, **Sub-Grid Properties** opens.

   For more information about editing a chart or list component, click:

   - Edit a chart component.

   Verify or change the details, as required:

a. **Name**. This is the name of the chart.

b. **Label**. This is what displays on the chart component header.

c. **Display label on the Dashboard**. Select this check box if you want the label to display on the chart component header.

d. **Entity**. Click the entity for the chart.

e. **Default View**. Click the view that will be used to retrieve the data for the chart.

f. **Display Chart Selection**. Select this check box if you want the option to select different charts from the dashboard.

- Edit a list component.

Verify or change the information:

a. **Name**. Name of the chart.

b. **Entity**. Entity for which you want to insert a list.

c. **Default View**. View that is used to retrieve the data in the list.

d. **Display Search Box**. Select this check box if you want a search box to be available with the list. This lets you search for records in the list.

e. **Display Index**. Select this check box if you want the alphabetical index to be available with the list. This lets you jump to records starting with a particular letter or number.

f. **Display View Selection**. Select this check box if you want to be able to select a different view for the list.

9. Click **Save**.

Tips

- While designing the dashboard, you can rearrange the components that you have already added. Click the component header and drag it to an empty area on the dashboard or to the area of an existing component. When you drag a component over other components, a red line appears on top of the components to show that if you drop the component here, the existing component will move down.
- To undo the last action, in the **Action** group, click **Undo**. To repeat an action, in the **Action** group, click **Redo**.
- To change the width of a component, first select the component. In the **Layout** group, click **Increase Width** or **Decrease Width**. When you click **Increase Width** or **Decrease Width**, the width increases or decreases by one column.
- To change the height of a component, first select the component. In the **Layout** group, click **Increase Height** or **Decrease Height**. When you click **Increase Height** or **Decrease Height**, the height increases or decreases by three rows.

Note

- To remove a component from the dashboard designer, in the **Action** group, click **Remove**. When you remove a component, you cannot add a new component in the same place. A new component is added in the bottom area of the designer. You can rearrange the components at any time after you insert it.

- By default, you can add only six components to any dashboard layout. This limit is configurable. For more information, contact your system administrator.

Edit a user dashboard

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Dashboard Permissions

Only the user who created a user dashboard or a user with whom the dashboard is shared can delete a dashboard. The user with whom a dashboard is shared can delete it only when assigned Delete privileges at the time of sharing the dashboard.

1. In the Navigation Pane, click **Workplace**. Then, under **My Work**, click **Dashboards**.
2. In the **Dashboards** drop-down box, select the dashboard that you want to delete, and in the **Dashboard Management** group, click **Delete**.
3. In the confirmation message, click **OK**.

   Important
   If you delete your default dashboard, the next time you navigate to the **Dashboards** area, you will see the default system dashboard.

Related Topics

Delete a user dashboard

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Dashboard Permissions

Dashboards provide a way to combine data from different areas in a single place. The data is formatted to be easier to understand to provide quick insights. You can use the dashboard components for more in-depth information about the records.

After you design a dashboard, you can you can perform various actions on the dashboard and its components.

Drill down in a chart.

1. In the Navigation Pane, click **Workplace**. Then, under **My Work**, click **Dashboards**.
2. In the **Dashboard** list, click the name of the dashboard that you want to open.
3. Click the category area of the chart in which you want to drill down further to see lower level data.
4. In the shortcut menu, click **Select Field**, and then click the field by which you want to group the category.

For example, you are viewing a chart that shows opportunities by potential customers. You want to drill down to see the opportunities for one potential customer, grouped by probability. Click the potential customer on the chart, click **Select Field**, and then click **Probability**. The chart now shows the opportunities for this customer with the probability of each opportunity.

5. Click the corresponding icon for a chart type that you want use for viewing the data.
6. Click **OK**.

   You can drill down even further on the resulting chart from the drill down on a chart.

Enlarge a chart.

1. In the Navigation Pane, click **Workplace**. Then, under **My Work**, click **Dashboards**.
2. In the **Dashboard** list, click the name of the dashboard that you want to open.
3. Move the pointer over the chart and pause, and then click the **Enlarge the chart** button .

View the records that are used to generate the chart.

1. In the Navigation Pane, click **Workplace**. Then, under **My Work**, click **Dashboards**.
2. In the **Dashboard** list, click the name of the dashboard that you want to open.
3. Move the pointer over the chart and pause, and click the **View the records that are used to generate the chart** button .

Apply filters on the list.

1. In the Navigation Pane, click **Workplace**. Then, under **My Work**, click **Dashboards**.
2. In the **Dashboard** list, click the name of the dashboard that you want to open.
3. Click the component area that contains the list of records.
4. In the **Current View** group, click **Filter**.

   A **Filter** button is now available for all the columns in the list.
5. On the column on which you want to apply a filter, click the **Filter** button . Then do one of the following:
   - Click one of the default filters for the column.

     - OR -
   - Click **Custom Filter**, choose how to filter the records, and then click **OK**.

Refresh all components in the dashboard.

1. In the Navigation Pane, click **Workplace**. Then, under **My Work**, click **Dashboards**.
2. In the **Dashboard** list, click the name of the dashboard that you want to refresh.
3. In the **Action** group, click **Refresh All**.

Drill down in a chart

1. In the Navigation Pane, click **Workplace**. Then, under **My Work**, click **Dashboards**.
2. In the **Dashboard** list, click the name of the dashboard that you want to open.

3. Click the category area of the chart in which you want to drill down further to see lower level data.
4. In the shortcut menu, click **Select Field**, and then click the field by which you want to group the category.

   For example, you are viewing a chart that shows opportunities by potential customers. You want to drill down to see the opportunities for one potential customer, grouped by probability. Click the potential customer on the chart, click **Select Field**, and then click **Probability**. The chart now shows the opportunities for this customer with the probability of each opportunity.
5. Click the corresponding icon for a chart type that you want use for viewing the data.
6. Click **OK**.

   You can drill down even further on the resulting chart from the drill down on a chart.

Enlarge a chart

1. In the Navigation Pane, click **Workplace**. Then, under **My Work**, click **Dashboards**.
2. In the **Dashboard** list, click the name of the dashboard that you want to open.
3. Move the pointer over the chart and pause, and then click the **Enlarge the chart** button .

View records used for a chart

1. In the Navigation Pane, click **Workplace**. Then, under **My Work**, click **Dashboards**.
2. In the **Dashboard** list, click the name of the dashboard that you want to open.
3. Move the pointer over the chart and pause, and click the **View the records that are used to generate the chart** button .

Apply filter

1. In the Navigation Pane, click **Workplace**. Then, under **My Work**, click **Dashboards**.
2. In the **Dashboard** list, click the name of the dashboard that you want to open.
3. Click the component area that contains the list of records.
4. In the **Current View** group, click **Filter**.

   A **Filter** button is now available for all the columns in the list.
5. On the column on which you want to apply a filter, click the **Filter** button . Then do one of the following:
   - Click one of the default filters for the column.

     - OR -
   - Click **Custom Filter**, choose how to filter the records, and then click **OK**.

Refresh all components

1. In the Navigation Pane, click **Workplace**. Then, under **My Work**, click **Dashboards**.
2. In the **Dashboard** list, click the name of the dashboard that you want to refresh.
3. In the **Action** group, click **Refresh All**.

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Dashboard Permissions

To use an existing user dashboard or an existing system dashboard as a base to create another dashboard, make a copy of the existing dashboard. You can save a system dashboard as a user dashboard and assign or share it with users or teams in your organization.

Note
A system dashboard that contains an IFrame with the **Restrict cross-frame scripting** check box cleared cannot be saved as a user dashboard.

1. In the Navigation Pane, click **Workplace**. Then, under **My Work**, click **Dashboards**.
2. In the **Dashboard** list, select the system or user dashboard that you want to copy as a new dashboard. In the **Dashboard Management** group, click **Save As**.
3. In the **Dashboard Properties** dialog box, type a name and a description for the dashboard, and then click **OK**.

Related Topics

Make a copy of an existing user or system dashboard

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Dashboard Permissions

You can make a dashboard your default dashboard. Then, you will see this dashboard each time you navigate to the **Dashboards** area.

1. In the Navigation Pane, click **Workplace**. Then, under **My Work**, click **Dashboards**.
2. In the **Dashboard** list, select the dashboard that you want to set as the default. Then, in the **Dashboard Management** group, click **Set As Default**.

   When you set a dashboard as your default dashboard, it overrides the default system dashboard that has been set for your organization.

   Important
   If you delete your default dashboard, the next time you navigate to the **Dashboards** area, you will see the default system dashboard.

Related Topics

Make a dashboard your default dashboard

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Dashboard Permissions

You can share any user dashboard with another user or team in your organization:

1. In the Navigation Pane, click **Workplace**. Then, under **My Work**, click **Dashboards**.
2. In the **Dashboard** list, select the dashboard that you want to share. In the **Action** group, click **Share Dashboard**.
3. In the **Who would you like to share the selected user dashboard with?** dialog box, under **Common Tasks**, click **Add User/Team**.
4. In the **Look Up Records** dialog box, in the **Look for** list, select the type of record you want to find.
5. In the **Search** box, type the first few letters of the name of the record to narrow your search, and then click the **Find** button .
6. In the list of available records, select the check boxes for the users or teams, and then click **Add**.
7. Click **OK**.
8. In the **Who would you like to share the selected user dashboard with?** dialog box, select the type of share access that you want. The available permissions are: Read, Write, Delete, Append, Assign, or Share.
9. Click **OK**.
10. More information: Share a record.

Related Topics

Share a user dashboard

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Dashboard Permissions

You can assign any user dashboard to other users or teams in your organization.

1. In the Navigation Pane, click **Workplace**. Then, under **My Work**, click **Dashboards**.
2. In the **Dashboards** drop-down box, select the dashboard that you want to assign. In the **Action** group, click **Assign**.

3. On **Assign User Dashboard**, click one of the options:
   - **Assign to me**.

     - OR -
   - **Assign to another user or team**:
     1. Click the **Lookup** button .
     2. In the **Look Up Record** dialog box, in the **Look for** list, click **User** or **Team**.
     3. In the **Search** box, type a part of a user name or a team name, and then, click the **Find** button .
     4. Select the user or team name, and then click **OK**.
4. Click **OK**.

Related Topics

Auditing data in Microsoft Dynamics CRM

Track changes made to your business data by auditing your data. Use auditing to analyze the history of a particular record, view a summary of everything that changed, or to comply with regulation standards. Keep track of the changes done to a record, a field, or by a user. Microsoft Dynamics CRM automatically creates logs for the changes that are tracked.

Tracking changes for entity relationships

In Microsoft Dynamics CRM, audit tracking for entity relationships is handled differently than audit tracking for entities or fields. Here are some examples of how they are audited:

Entity Relationships	Scenarios	What is audited	Summary
1:N	Contact associated with a parent account	If auditing is enabled for the Contact entity, the changes to the parent account reference is tracked. If auditing is enabled for the Account entity but not for the Contact entity, no change will be tracked for this transaction because the Account entity did not change.	In a 1:N relationship between entities, the change is reflected only on a single entity. Only changes to the entity that changed are recorded, provided the entity is enabled for audit.

N:N	Lead added to a marketing list	If auditing is enabled for the Lead entity, the marketing list it is added to is tracked for changes. If auditing is enabled for the Marketing List entity, the lead that is added is tracked for changes.	In an N:N relationship between entities, the change is captured on both entities, provided that the entities are enabled for audit. If auditing is enabled for one entity, the association of this entity with the other entity is tracked.
Special Cases	Lead added to an activity, such as an e-mail activity	If auditing is enabled for the e-mail entity, e-mail activity is tracked for changes. If auditing is enabled for the Lead entity, nothing is tracked because the Lead entity did not change.	When the N:N relationship involves certain type of entities, such as an ActivityPartyBase or a PartyList, the relationship internally is handled as 1:N and the changes are tracked only on the ActivityPartyBase entity or the PartyList entity, provided ActivityPartyBase or PartyList is enabled for audit.

Can I do this task?

This task requires the System Administrator or System Customizer security role or equivalent permissions. More information about specific permissions and performing this task while offline: Auditing Permissions

Start auditing at the organization level to allow auditing for entities and fields. When you start auditing for the first time, auditing is started by default on the following entities: Account, Contact, Goal, Goal Metric, Lead, Marketing List, Product, Quick Campaign, Rollup Query, and Sales Literature.

You may want to stop auditing for maintenance purposes or when the database space is limited. Stopping auditing at the organization level stops the tracking of changes for the entities or fields for the period for which auditing is stopped at the organization level. When you start organization level auditing again, the same entities and fields are selected for auditing that were selected when you stopped auditing for the organization.

1. In the Navigation Pane, click **Settings**. Then under **System**, click **Auditing**.
2. In the **Audit** area, click **Global Audit Settings**.
3. To start audit tracking, in the **System Settings** dialog box, click the **Auditing** tab. Then, select the **Start Auditing** check box.

   - OR -

   To stop audit tracking, clear the **Start Auditing** check box.
4. To start or stop auditing on specific business areas, select or clear one of the following the check boxes:
   - **Common Entities**. This check box is selected by default when you start auditing for the first time.

- **Sales Entities**. When select or clear this check box, auditing is started or stopped for the following entities: Competitor, Opportunity, Invoice, Order, and Quote.
- **Marketing Entities**. When select or clear this check box, auditing is started or stopped for the Campaign entity.
- **Customer Service Entities**. When select or clear this check box, auditing is started or stopped for the following entities: Case, Contract, and Service.

5. Click **OK**.

Related Topics

View the audit history of individual records....163
View audit summary of records....162

Start or stop auditing for an organization

Can I do this task?

This task requires the System Administrator or System Customizer security role or equivalent permissions. More information about specific permissions and performing this task while offline: Auditing Permissions

You must start auditing at an organization level to enable auditing for an entity.

1. In the Navigation Pane, click **Settings**. Then under **System**, click **Auditing**.
2. In the **Audit** area, click **Entity and Field Audit Settings**.
3. Under **Components**, expand **Entities**.
4. Click the entity for which you want to start or stop auditing.
5. To start auditing, on the **General** tab, in the **Options for Entity** section, select the **Auditing** check box.

   To stop auditing, clear the **Auditing** check box.

   By default, when you start or stop auditing for an entity, you also start or stop auditing for all the fields of this entity.

   Note
   To publish the changes, click **Publish**.

Related Topics

View the audit history of individual records....163
View audit summary of records....162

Enable or disable auditing for entities

Can I do this task?

This task requires the System Administrator or System Customizer security role or equivalent permissions. More information about specific permissions and performing this task while offline: Auditing Permissions

By default, when you enable auditing for an entity, auditing is also enabled on all its fields. You can select or clear fields for which you want to enable auditing.

1. In the Navigation Pane, click **Settings**. Then under **System**, click **Auditing**.
2. In the **Audit** area, click **Entity and Field Audit Settings**.
3. Under **Components**, expand **Entities**.
4. Expand the entity that has the fields for which you want to start or stop auditing, and click **Fields**.
5. In the field list, to start or stop auditing for a single field, open the field, and in the **Auditing** field, click **Enabled** or **Disabled**, respectively.

   - OR -

   To start or stop auditing for more than one field, select all the fields to be started or stopped. On the Actions toolbar, click **Edit**. Then in the **Edit Multiple Fields** dialog box, in **Auditing**, click **Enabled** or **Disabled**, respectively.
6. Click **Save**.
7. Click **Publish All Customizations**.

Notes

- Before you enable field auditing, you must first enable auditing for the organization.
- Field auditing only tracks value changes to the field. Field auditing does not track enabling or disabling Field Level Security for the field.
- Not all fields can be audited in Microsoft Dynamics CRM. To know the fields on which you can enable auditing:

1. In the Navigation Pane, click **Settings**.
2. Under **Customization**, click **Customizations**.
3. In the **Customization** area, click **Customize the System**.
4. Under **Components**, expand **Entities**, and then expand the entity you want.
5. Click **Fields**.
6. For each field, see the value in the **Audit Status** column. Auditing cannot be enabled on any field that has **Non Applicable** in the **Audit Status** column.

Related Topics

View the audit history of individual records..... 163

View audit summary of records..... 162

View audit summary of records

Can I do this task?

This task requires the System Administrator or System Customizer security role or equivalent permissions. More information about specific permissions and performing this task while offline: Auditing Permissions

For each entity for which auditing is enabled, the audit summary shows the change details of all records that are audited in a chronological order, starting from the recent ones.

1. In the Navigation Pane, click **Settings**. Then under **System**, click **Auditing**.
2. In the **Audit** area, click **Audit Summary View**.
3. The following table shows various tasks that you can perform on the **Audit Summary View** page.

Tasks	**Required Steps**
See the changes made on a particular date	a. Click **Enable/Disable Filters**. b. On the **Changed Date** column header, click the **Filter** button . c. Click one of the default date filters, and then click **OK**. - OR - Click **Custom Filter**, specify the filter criteria, and then click **OK**.
See the records on which a particular action was performed	a. Click **Enable/Disable Filters**. b. On the **Action** column header, click the **Filter** button . c. Under **Custom Filter**, select the check boxes for the actions that you want to see, and then click **OK**.
See the changes done by a particular user	a. Click **Enable/Disable Filters**. b. On the **Changed By** column header, click the **Filter** button . c. Click **Custom Filter**, specify the filter criteria, and then click **OK** - OR - Click **Filter by specific Changed By...**, and in the **Look Up Records** dialog box, search and select users, and then click **OK**.
See all the changes done in a particular record	In the **Record** column, double-click the record.
See all the changes made to a particular entity	a. Click **Enable/Disable Filters**. b. On the **Entity** column header, click the **Filter** button . c. Under **Custom Filter**, select the check box for the entity, and then click **OK**.

See the records that underwent a particular operation	a. Click **Enable**/**Disable Filters**. b. On the **Operation** column header, click the **Filter** button . c. Under **Custom Filter**, select the check box for the operation, and then click **OK**.

Important

If you share a record with another user, and if that user has the View Audit History privilege on the shared record, the other user will be able to view the changes to the shared record.

Note

If auditing is stopped and restarted at the organization, entity, or field level, any new values prior to stopping the audit will not be used in an audit log or audit history. For example, two days ago the value in the **Rating** field is **Cold** when auditing is stopped. Auditing was started today. During the two days without auditing, the value for the field changed from **Cold** to **Warm** to **Hot**. When restarting the audit, the audit history has **Cold** (the value when the auditing stopped), although the **New Values** column has a symbol to show you that auditing had been disrupted.

Related Topics

Tracking changes for entity relationships 158

View the audit history of individual records

Can I do this task?

This task requires a manager, vice president, CEO-Business Manager, System Administrator, or System Customizer security role or equivalent permissions. More information about specific permissions and performing this task while offline: Auditing Permissions

You can view the audit history of records only when auditing is enabled for the organization and enabled for the record types and fields.

1. In any list of records, open the record for which you want to view the changes made.
2. Under **Related**, click **Audit History**.
3. In the **Filter on** drop-down box, click a field for which you want to view the audit history.

   - OR -

   To view the audit history of all the fields in the record, click **All Fields**.

   Note

   By default, all fields for which auditing is enabled is displayed in the list.

   The following details are listed for the audited fields:

   - The date when the fields were changed.
   - The user who updated the fields.

- The action performed on the fields, such as Create or Update.
- The previous and new value for the changed field.

Note

If auditing is stopped and restarted at the organization, entity, or field level, any new values prior to stopping the audit will not be used in an audit log or audit history. For example, two days ago the value in the **Rating** field is **Cold** when auditing is stopped. Auditing was started today. During the two days without auditing, the value for the field changed from **Cold** to **Warm** to **Hot**. When restarting the audit, the audit history has **Cold** (the value when the auditing stopped), although the **New Values** column has a symbol to show you that auditing had been disrupted.

4. To open the change list for an item, double-click the item.

Note

When a reference for a record to another record is changed or added, the changes for the referenced record will not be tracked. The changes will be tracked for the referring record. More information: *Tracking changes for entity relationships* (on page 158).

Related Topics

Tracking changes for entity relationships 158

Create Customer-Ready Documents and Messages

There are two main methods of creating customer-ready documents: mail merge and direct e-mail. With mail merge, you can use Microsoft Office Word and Microsoft Office Word templates to create letters, faxes, envelopes, and e-mail messages. With direct e-mail, you can send a mass mailing of the same message using Microsoft Dynamics CRM e-mail templates to multiple e-mail recipients. This is also known as sending bulk e-mail.

Create a Microsoft Office Word mail merge document

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: E-mail Permissions

In Microsoft Dynamics CRM for Outlook, only one mail merge can be run at a time. If you receive the message "Microsoft Dynamics CRM Mail Merge is already running" and want to discontinue a mail merge, close and then reopen Microsoft Office Word or Microsoft Internet Explorer. You can run multiple mail merge processes at the same time in the Web application.

To use mail merge, your e-mail format must be HTML.

Record types that use mail merge

- Account

- Campaign

  To use mail merge with a campaign, you must first distribute a mail campaign activity to a selected marketing list.

- Contact
- Lead
- Opportunity
- List Member in Marketing List
- Quick Campaign

  In Microsoft Dynamics CRM for Outlook, you can create a mail merge, and then at the end of the process, create a quick campaign.

- Quote

  With mail merge, you can print only one quote at a time.

1. Open the list of records you want.
2. In the list, select the record you want to add to the mail-merge recipient list.
3. On the **Add** tab, in the **Marketing** group, click **Mail Merge**.

   After mail merge starts, do not change the mail merge type and do not exit Microsoft Internet Explorer.
4. If you have other languages installed, you can select a language to filter the list of templates.
5. In the **Mail Merge** dialog box, select the type of document you want to use.

   Note

   If the **E-mail** option is not available, the **Enable Direct E-mail via Mail Merge** option in the **System Settings** may be set to **No**. More information: Manage System Settings
6. Select if you want to start with a blank document or a template. If you select a template option, click the **Lookup** button to select a template.

   New mail merge templates are created in the Settings area. More information: Work with Mail Merge Templates
7. If necessary, you can add or delete data fields.

   Microsoft Office Word supports up to 64 data fields, of which Microsoft Dynamics CRM for Outlook reserves two data fields to store the primary key and the record owner.
8. Click **OK**.

   Microsoft Dynamics CRM automatically opens a Microsoft Office Word document. In the **File Download** dialog box, click **Open**.

   This is not your mail-merge document. This is an interim page. Follow the directions in the Word document, including clicking **CRM**.
9. In the **Mail Merge Recipient** dialog box, verify that the list is accurate, and then click **OK**.
10. To continue the mail merge, follow the instructions provided by the Mail Merge pane. For more information, see the Microsoft Office Word Help documentation.

Tip

- To display the information you want and select the format, in the Mail Merge wizard, click **Address Block** and then **Greeting Line**.
- To add data fields to display more information, click **More Items**. You can use up to 64 data fields.

  - To display the information you want and select the format, in the Mail Merge wizard, click **Address Block** and then **Greeting Line**.
  - To add data fields to display more information, click **More Items**. You can use up to 64 data fields.

11. If you are working in Microsoft Dynamics CRM for Outlook and you have either created a new template or updated an existing template, you can upload the template.

    - To save the document as a template, on the **Complete the Merge** pane, click **Upload Template to CRM**.

    If you are working in the Web application, you can upload the template in the Settings area. More information: Work with Mail Merge Templates

12. When you have completed work on the mail merge document, close it, and then delete the interim mail-merge document (Mail_Merge_nnnn.xml) and the associated text file (Mail_Merge_nnnn.txt) with the same name.

    Warning Mail merge may leave sensitive data on your computer.

    The mail merge process creates two files in addition to your mail merge documents. These files are the data sources used by mail merge and contain Microsoft Dynamics CRM data, which may include sensitive customer data. You should delete these data source files after you complete the mail merge.

    Both files have the same name: Mail_Merge[nnnn], where *nnnn* is a 4-character, randomly generated number. One file is a .doc file and the other is a .txt file. Unless you moved the files or saved them to another directory, these files are usually in a temporary files folder on your computer.

13. If you are working in Microsoft Dynamics CRM for Outlook, after you print or send the document, you can choose to create activities for mail-merge items.

    1. In the **Create Activities** dialog box, click **Create Microsoft Dynamics CRM activities**.
    2. If you want to change the default values for the activity, click **Activity Details**, and then make any changes. To save the changes, click **OK**.
    3. Under **Assign activities to**, select to whom the new activities should be assigned.
    4. You can choose to have the new activities closed immediately. E-mail activities are closed as soon as the messages are sent.
    5. If you are creating a mail merge from a marketing list, you can also make the mail merge a quick campaign and include an link in e-mail messages for customers to remove themselves from your marketing lists.
    6. Click **OK** to save the changes and create the activities.

Closed activities appear in the history list of the customer record. Open activities appear in the activities list of the customer record and in your list of active activities.

NOTE: The following Microsoft Word 2003 toolbar options do not create activities: Merge to New Documents, Merge to Printer, and Merge to Word.

Note
If an account or contact does not have a valid e-mail address or has the **Do Not Allow** option set for **Bulk E-mail**, the message is not sent to them, and no e-mail activity is created.

Related Topics

Create Customer-Ready Documents and Messages 164
Send Direct E-mail to Customers 171
Work with Campaigns and Campaign Templates 375

Create a mail merge document with marketing lists

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: E-mail Permissions

You can create a mail merge for a marketing list that is part of a campaign.

In Microsoft Dynamics CRM for Outlook, only one mail merge can be run at a time. If you receive the message "Microsoft Dynamics CRM Mail Merge is already running" and want to discontinue a mail merge, close and then reopen Microsoft Office Word or Microsoft Internet Explorer. You can run multiple mail merge processes at the same time in the Web application.

1. In the Navigation Pane, click **Marketing** or **Sales**, and then click **Marketing Lists**.

   You can also open a marketing list from a campaign.

2. On the Actions toolbar, click **Mail Merge on List Members** .
3. If you have other languages installed, you can select a language to filter the list of templates.
4. In the **Mail Merge** dialog box, select the type of document you want to use.

   Note

   If the **E-mail** option is not available, the **Enable Direct E-mail via Mail Merge** option in the **System Settings** may be set to **No**. More information: Manage System Settings

5. Select if you want to start with a blank document or a template. If you select a template option, click the **Lookup** button to select a template.

   New mail merge templates are created in the Settings area. More information: Work with Mail Merge Templates

6. If necessary, you can add or delete data fields.

Microsoft Office Word supports up to 64 data fields, of which Microsoft Dynamics CRM for Outlook reserves two data fields to store the primary key and the record owner.

7. Click **OK**.

   Microsoft Dynamics CRM automatically opens a Microsoft Office Word document. In the **File Download** dialog box, click **Open**.

   This is not your mail-merge document. This is an interim page. Follow the directions in the Word document, including clicking **CRM**.

8. In the **Mail Merge Recipient** dialog box, verify that the list is accurate, and then click **OK**.

9. To continue the mail merge, follow the instructions provided by the Mail Merge pane. For more information, see the Microsoft Office Word Help documentation.

   Tip

   - To display the information you want and select the format, in the Mail Merge wizard, click **Address Block** and then **Greeting Line**.
   - To add data fields to display more information, click **More Items**. You can use up to 64 data fields.

10. If you are working in Microsoft Dynamics CRM for Outlook and you have either created a new template or updated an existing template, you can upload the template.

    - To save the document as a template, on the **Complete the Merge** pane, click **Upload Template to CRM**.

    If you are working in the Web application, you can upload the template in the Settings area. More information: Work with Mail Merge Templates

11. When you have completed work on the mail merge document, close it, and then delete the interim mail-merge document (Mail_Merge_nnnn.xml) and the associated text file (Mail_Merge_nnnn.txt) with the same name.

    Warning Mail merge may leave sensitive data on your computer.

    The mail merge process creates two files in addition to your mail merge documents. These files are the data sources used by mail merge and contain Microsoft Dynamics CRM data, which may include sensitive customer data. You should delete these data source files after you complete the mail merge.

    Both files have the same name: Mail_Merge[nnnn], where *nnnn* is a 4-character, randomly generated number. One file is a .doc file and the other is a .txt file. Unless you moved the files or saved them to another directory, these files are usually in a temporary files folder on your computer.

12. If you are working in Microsoft Dynamics CRM for Outlook, you can choose to create Microsoft Dynamics CRM activities for mail merge items.

    1. In the **Create Activities** dialog box, click **Create Microsoft Dynamics CRM activities**.
    2. If you want to change the default values for the activity, click **Activity Details**, and then make any changes. To save the changes, click **OK**.
    3. Under **Assign activities to**, select to whom the new activities should be assigned.
    4. You can choose to have the new activities closed immediately. E-mail activities are closed as soon as the messages are sent.

5. If you are creating a mail merge from a marketing list, you can also make the mail merge a quick campaign and include an link in e-mail messages for customers to remove themselves from your marketing lists.
6. Click **OK** to save the changes and create the activities.

Closed activities appear in the history list of the customer record. Open activities appear in the activities list of the customer record and in your list of active activities.

NOTE: The following Microsoft Word 2003 toolbar options do not create activities: Merge to New Documents, Merge to Printer, and Merge to Word.

Note
If an account or contact does not have a valid e-mail address or has the **Do Not Allow** option set for **Bulk E-mail**, the message is not sent to them, and no e-mail activity is created.

Related Topics

Create Customer-Ready Documents and Messages 164
Send Direct E-mail to Customers 171
Work with Campaigns and Campaign Templates 375

Print a quote with a mail-merge document

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: E-mail Permissions

You can use a mail-merge template to generate a customer-ready document that displays data from a saved quote. That document includes a header and a footer.

In Microsoft Dynamics CRM for Outlook, only one mail merge can be run at a time. If you receive the message "Microsoft Dynamics CRM Mail Merge is already running" and want to discontinue a mail merge, close and then reopen Microsoft Office Word or Microsoft Internet Explorer. You can run multiple mail merge processes at the same time in the Web application.

1. In the Navigation Pane, click **Sales**, and then click **Quotes**.
2. Open the quote you want to print. If you want to use mail merge with a new quote, before starting the mail merge, save the quote first.
3. In the **Actions** group, click **Print Quote for Customer**.
4. If you have other languages installed, you can select a language to filter the list of templates.
5. Select if you want to start with a blank document or a template. If you select a template option, click the **Lookup** button to select a template.

   New mail merge templates are created in the Settings area. More information: Work with Mail Merge Templates

6. If necessary, you can add or delete data fields.

   Microsoft Office Word supports up to 64 data fields, of which Microsoft Dynamics CRM for Outlook reserves two data fields to store the primary key and the record owner.

   While working with quotes, removing or re-arranging data fields may cause the quote to not display or print properly. The footer displays after "LastItem", which marks the end of the quote data fields.

7. Click **OK**.

   Microsoft Dynamics CRM automatically opens a Microsoft Office Word document. In the **File Download** dialog box, click **Open**.

   This is not your mail-merge document. This is an interim page. Follow the directions in the Word document, including clicking **CRM**.

8. In the **Mail Merge Recipient** dialog box, verify that the list is accurate, and then click **OK**.

9. To continue the mail merge, follow the instructions provided by the Mail Merge pane. For more information, see the Microsoft Office Word Help documentation.

   Tip

   - To display the information you want and select the format, in the Mail Merge wizard, click **Address Block** and then **Greeting Line**.
   - To add data fields to display more information, click **More Items**. You can use up to 64 data fields.

10. If you are working in Microsoft Dynamics CRM for Outlook and you have either created a new template or updated an existing template, you can upload the template.

    - To save the document as a template, on the **Complete the Merge** pane, click **Upload Template to CRM**.

    If you are working in the Web application, you can upload the template in the Settings area. More information: Work with Mail Merge Templates

11. When you have completed work on the mail merge document, close it, and then delete the interim mail-merge document (Mail_Merge_nnnn.xml) and the associated text file (Mail_Merge_nnnn.txt) with the same name.

    Warning Mail merge may leave sensitive data on your computer.

    The mail merge process creates two files in addition to your mail merge documents. These files are the data sources used by mail merge and contain Microsoft Dynamics CRM data, which may include sensitive customer data. You should delete these data source files after you complete the mail merge.

    Both files have the same name: Mail_Merge[nnnn], where *nnnn* is a 4-character, randomly generated number. One file is a .doc file and the other is a .txt file. Unless you moved the files or saved them to another directory, these files are usually in a temporary files folder on your computer.

12. If you are working in Microsoft Dynamics CRM for Outlook, after you merge the new document, you can choose to create Microsoft Dynamics CRM activities for mail-merge items.

    1. In the **Create Activities** dialog box, click **Create Microsoft Dynamics CRM activities**.
    2. If you want to change the default values for the activity, click **Activity Details**, and then make any changes. To save the changes, click **OK**.

3. Under **Assign activities to**, select to whom the new activities should be assigned.
4. You can choose to have the new activities closed immediately. E-mail activities are closed as soon as the messages are sent.
5. If you are creating a mail merge from a marketing list, you can also make the mail merge a quick campaign and include an link in e-mail messages for customers to remove themselves from your marketing lists.
6. Click **OK** to save the changes and create the activities.

Closed activities appear in the history list of the customer record. Open activities appear in the activities list of the customer record and in your list of active activities.

NOTE: The following Microsoft Word 2003 toolbar options do not create activities: Merge to New Documents, Merge to Printer, and Merge to Word.

Related Topics

Work with Quotes 340
Create Customer-Ready Documents and Messages 164
Send Direct E-mail to Customers 171
Work with Campaigns and Campaign Templates 375

Send Direct E-mail to Customers

You can send a mass-mailing of the same message using Microsoft Dynamics CRM e-mail templates to multiple e-mail recipients. This is referred to as direct or bulk e-mailing.

You can also use mail merge with Microsoft Office Word and Microsoft Office Word templates to create the message. More information: *Create Customer-Ready Documents and Messages* (on page 164)

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: E-mail Permissions

Notes

- Direct e-mail uses Microsoft Dynamics CRM e-mail templates. If you want to use Microsoft Office Word templates, use the mail merge feature.
- To use the **Send Direct E-mail** option for a custom entity that is enabled for sending e-mail, you must select the **Activities** check box in the custom entity properties. More information: Entity Properties

1. In the Navigation Pane, under **Sales** or **Marketing**, click the record type you want, for example, **Contacts**.

Note

- Which panes you see will depend on the security roles you have been assigned.
- You can also send direct e-mail to users from the **Users** list.

2. In the **View** list, select the filtered view you want.
3. If you want to send direct e-mail to only a few people, select the records you want.

   - OR -

   If you want to send direct e-mail to everyone displayed in the current list, go to the next step.
4. On the Actions toolbar, click **Send Direct E-mail** .
5. In the **Send Direct E-mail** dialog box, select the template you want to use. To view a description of the template, select the template.
6. Click **Send**.

Note

If an account or contact does not have a valid e-mail address or has the **Do Not Allow** option set for **Bulk E-mail**, the message is not sent to them, and no e-mail activity is created.

Tips

- You can also select recipients from a search in Advanced Find. When you use **Advanced Find**, you can reduce the number of message failures that are due to customers for whom you do not have e-mail addresses. In a new or saved search, click **Select**, and select **E-mail**. Click **Equals** and select **Contains Data**. Enter any other search criteria and then click **OK**.
- You can change the sender's contact information. To change contact information, in the **User or Queues** box, click the **Lookup** button to search for a record.

Related Topics

Create Customer-Ready Documents and Messages.....164
Work with E-mail Templates.....187

Manage Activities

Create or edit an activity

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

1. Navigate to activity records.

   In the Navigation Pane, click **Workplace**, and then under **My Work** click **Activities**.

- OR -

To work with activities associated with a record, open the record and then click **Activities**.

2. To add new activities from the **Activities** list, on the **Activities** tab in the **New** group, click the type of activity you want to add.

   - OR -

3. To add a new activity from a record, click **Add New Activity**. Select an activity type, and then click **OK**.
4. Enter the information that you want. At a minimum, entering information in the following boxes is useful when you or others in your organization refer to the activity at a later date:

   - **Subject**

     Enter a meaningful description that can help you easily identify the activity in the Activities list view. The subject field is required because, by default, most of the Activities views are sorted by it. This field is not related to Subjects, which are the hierarchical list of categories used to relate and organize information in Microsoft Dynamics CRM.

   - **Regarding**

     This field is used to link the activity to another record so that you can view the activity from the record. If you create a new activity from a record, this is automatically filled out.

   - **Owner**

     This box represents the user who owns the activity. By default, it is set to the user who creates the activity.

   - **Duration**

     If this activity is related to a case, make sure that you record the time you spend on the activity in this box. If the case is linked to a contract line, the durations of all the activities for this case are tallied and updated automatically in the related active contract. The total, which includes the totals from any other cases relating to that contract, can be adjusted manually before billing the customer. The maximum duration of an appointment or service activity is 10 days.

   - **Due**

     Enter the date and time that the activity is expected to take place or be completed. You can quickly sort on the **Due** field when you view activities.

   Tip

   - To automatically update the Regarding field with information from a record, click the **Expand** button in the right pane to open the Form Assistant pane, and then select a record.

5. Some activities also have the following optional fields:

   - **Sender**

     You can use this field to record the user in your organization who initiated an outgoing communication. Alternatively, if this is an incoming communication from a customer, you can select the lead, account, or contact who initiates the communication. The sender must be a valid Microsoft Dynamics CRM account, contact, or lead, but can also be a Microsoft Dynamics CRM user. By default, this box contains the name of the user who creates the activity.

- **Recipient**

  This is the person, typically an account, contact, lead, or Microsoft Dynamics CRM user, that receives the communication.

- **Category**, **Sub-Category**

  You can use these text fields to categorize tasks so that you can sort or view your tasks by category and/or sub-category.

6. Click **Save** or **Save and Close**.

Tip

If you are using the activity to track something that has already been completed, on the **File** menu, click **Save as Completed**.

When you save an activity as completed, duplicates will not be detected.

Notes

- To create the same activity for multiple records, use a quick campaign. More information: *Work with Quick Campaigns* (on page 382)
- You cannot edit multiple activities at once.
- You cannot schedule recurring activities.
- You cannot reactivate or edit a closed activity. However, you can add a note to a closed activity.
- You cannot change one activity into another type of activity.
- You cannot set reminders in Microsoft Dynamics CRM for Microsoft Office Outlook for faxes, phone calls, e-mails, letters, or campaign responses activities created in the Web application or Microsoft Dynamics CRM for Outlook.
- When the duration of an activity is more than 60 minutes (an hour), the time you enter is converted into hours. When the activity is saved, the value is rounded up and might change from the entry that was originally displayed when it was converted from minutes into hours. Note that rounding is only observed on the hundredth of an hour. The exact value for the duration, however, is stored in the database in minutes, and this value is used to calculate the total billing time when resolving cases.
- The letter and fax activities record when the letter or fax is sent or received. When you create the activity, you attach the letter or fax document, such as a Microsoft Office Word file, to the record. With the mail merge feature, you can write your letter and include Microsoft Dynamics CRM data. More information: *Create Customer-Ready Documents and Messages* (on page 164)

Related Topics

Manage Activities 23
Create an Activity in Outlook 460
Send Direct E-mail to Customers 171

Create and send an e-mail activity in the Web application

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: E-mail Permissions

You can create and send e-mail activities in Microsoft Dynamics CRM from the **Activities** area. E-mail messages that are sent from Microsoft Dynamics CRM do not appear in the Microsoft Dynamics CRM mail folders in Outlook, unless synchronization is set up.

1. Start Microsoft Dynamics CRM.
2. In the Navigation Pane, click **Workplace**, and then click **Activities**.
3. On the **Activities** tab, in the **New** group, click **E-mail**.
4. On the **E-mail** tab, enter the following information:

   - **From**

     Locate and select the sender's name.

   - **To**

     Locate and select one or more recipients. You can click the **Lookup** button to search for and select records.

   - **Subject**

     Type a subject for your e-mail message.

   - **Duration**

     This field is not required, but if you are tracking the amount of time spent on cases, and this message is related to a case, enter the amount of time spent on this message.

   - **Due**

     If you are not sending your e-mail message immediately, enter a date to complete and send the message. The message is not sent automatically.

   Tip

   - You can copy and paste content from Microsoft Office Word. This lets you take advantage of features such as spelling check and some text formatting. If your text is double-spaced, you can press SHIFT+ENTER to single-space lines of text.
   - You can include an image if the file is hosted on a public Web site. Use the copy and paste feature of Microsoft Internet Explorer to include a link to the image in the message. The image is displayed as long as the receipient has access to the Web site.

   You can also attach an article, template, or file to an e-mail activity.

   To attach an article

   a. To look up and select an article, on the Formatting toolbar, click **Insert Article**.

   b. Use the **Search** tab to specify conditions or criteria to locate the article.

   c. In the results list, select the article, and then click **OK**.

      The article appears the body of in your e-mail message.

   d. Type any additional text, or edit the article.

To attach an e-mail template

e. To look up and select an e-mail template, click **Insert Template**.

f. On the **Insert Template** dialog box, select the template you want to use. You can either use a global template, or a template specific to the record type you selected as the recipient. For example, account or customer.

g. Click **OK**.

The template appears in the body of your e-mail message and the subject line is updated with the subject line of the template.

h. Type any additional text or edit the text provided. Editing the text or subject line in the message does not change the template.

To attach a file

a. Save the activity.

b. On the **Attachments** tab, click **New E-mail Attachment**.

c. In the **Add Attachment** dialog box, in the **File Name** box, type the name of the file, or click **Browse** to locate the file that you want to attach.

d. Click **Attach**.

5. To send the message immediately, click **Send**.

The message is sent and the new closed activity appears in Microsoft Dynamics CRM in the **Activities** area with an assigned message number appended to the subject. It also appears in Outlook in the Sent Items folder.

- OR -

To send the message at a later time, click **Save and Close**. The new draft activity appears in Microsoft Dynamics CRM in the **Activities** area. You can delete draft messages.

Important

After you save your e-mail message as a Microsoft Dynamics CRM e-mail activity, the saved message can be accessed by anyone who has access to your activities in Microsoft Dynamics CRM.

Notes

- You can view the sent date of an e-mail message on the **Activities** list. The **Actual End Date** is the date the message was sent and closed.
- You can forward or reply to an e-mail activity, but you cannot resend it.

To reply to only the original sender, open the e-mail message. In the **Respond** group, click **Reply**.

To reply to the original sender and to send copies to everyone who originally received the message, click **Reply All**.

To forward the e-mail activity to new recipients, click **Forward**, and then select new recipients.

- There is no spell check built into Microsoft Dynamics CRM. There might be third-party solutions available. For more information, visit *Microsoft Dynamics CRM Solution Finder* (see Microsoft Dynamics CRM Solution Finder - *http://go.microsoft.com/fwlink/?LinkId=98752*).

Related Topics

Work with E-mail Activities 187
Create an Activity in Outlook 460
Manage Activities 23
Send Direct E-mail to Customers 171
Save Outlook Contacts, Tasks, and E-mail Messages as Microsoft Dynamics CRM Records 465
Sending and Receiving E-mail in Microsoft Dynamics CRM for Outlook 185
Work with E-mail Templates 187
Managing E-mail Activities 184

Close an activity

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

Activity types that can be closed

- Tasks
- Faxes
- Phone Calls
- Letters
- Appointments
- Service Activities
- Campaign Activities

Unless you have created an activity record by mistake, it is better to close or convert an activity than to delete it. You can view closed or converted activities at a later date for reference, or run reports to determine the success rate of your activities.

1. Navigate to activity records.

   In the Navigation Pane, click **Workplace**, and then under **My Work** click **Activities**.

   - OR -

   To work with activities associated with a record, open the record and then click **Activities**.

2. Open the activity that you want.

3. On the **Actions** menu, click **Close activity type**. For example, if you are in a task record, click **Close Task**.

4. In the confirmation dialog box, select the status that you want from the **Status** list, such as **Completed** or **Canceled**, and then click **OK**.

Notes

- When you close an activity, the activity becomes read-only and cannot be edited or reopened.
- To view closed activities, do one of the following:
  - In the Activities list, select the **Closed Activities** view.
  - Use Advanced Find, and specify **Activity Status** in the search criteria.
  - From an Account, Contact, Lead, or Opportunity record, under **Common**, click **Closed Activities**. In the **Filter on** and **Include** lists, select the view options that you want.
- It is not possible to close multiple activities at once.
- The only way to close an e-mail activity is to send it. If you do not use Microsoft Dynamics CRM to send or receive e-mail, click **Send**. This will close the activity, but no e-mail message will be sent.

Convert an activity to an opportunity

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

Activity types that can be converted

- Faxes
- Phone Calls
- E-mail Messages
- Letters
- Appointments

1. Navigate to activity records.

   In the Navigation Pane, click **Workplace**, and then under **My Work** click **Activities**.

   - OR -

   To work with activities associated with a record, open the record and then click **Activities**.
2. Open the activity that you want.
3. On the Actions toolbar, click **Convert Activity**, and then click **To Opportunity**.
4. In the **Convert Activity to Opportunity** dialog box, enter information in the following boxes:
   - **Customer**

     You must click the **Lookup** button to select or create a new customer.
   - **Source Campaign**

     Click **Lookup** if you want to associate a source campaign with this activity.
   - **Actions**

By default, Microsoft Dynamics CRM automatically completes the following operations during the conversion.

- Close the activity as completed.
- Open the new opportunity after the conversion.
- Create a campaign response based on the information included in the opportunity.

  Important If you are converting an activity to an opportunity that is not associated with a Source Campaign, you must clear the **Record a closed campaign response** check box.

To change the conversion operations, clear the associated check boxes.

5. In the **Convert Activity to Opportunity** dialog box, click **OK**.
6. Click **Save** or **Save and Close**.

Note
The originating activity becomes a related activity for the new opportunity. If the activity is open, it appears in the **Activities** list for the opportunity. If the activity is closed, it appears in the **Closed Activities** list.

Related Topics

Manage Activities 23
Managing Opportunities 310
Managing Leads 289

Convert an activity to a case

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

1. Navigate to activity records.

   In the Navigation Pane, click **Workplace**, and then under **My Work** click **Activities**.

   - OR -

   To work with activities associated with a record, open the record and then click **Activities**.
2. Open the activity that you want.

   Activity types that can be converted

   - Faxes
   - Phone Calls
   - E-mail Messages
   - Letters

- Appointments

3. On the Actions toolbar, point to **Convert Activity** and then to **Case**.
4. In the **Convert Activity to Case** dialog box, enter information in the following boxes:
   - **Customer**

     You must click the **Lookup** button to select or create a new customer.
   - By default, Microsoft Dynamics CRM automatically completes the following operations during the conversion:
     - Close the activity as completed.
     - Open the new case after the conversion.

   To change the conversion operations, clear the associated check boxes.
5. In the **Convert Activity to Case** dialog box, click **OK**.

Note
The originating activity becomes a related activity for the new case. If the activity is open, it appears in the **Activities** list for the case. If the activity is closed, it appears in the **Closed Activities** list.

Related Topics

Work with Appointments 440
Work with E-mail Activities 187
Manage Activities 23

Convert an e-mail to another record type

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

1. Navigate to activity records.

   In the Navigation Pane, click **Workplace**, and then under **My Work** click **Activities**.

   - OR -

   To work with activities associated with a record, open the record and then click **Activities**.
2. Open the e-mail activity that you want to convert.
3. In the Actions toolbar, point to **Convert Activity**, and then click the record type that you want to convert to.
4. In the dialog box, type the appropriate information.

5. By default, Microsoft Dynamics CRM is set to perform specific operations when the conversion occurs. To change the conversion operations, clear the associated check boxes.
6. Click **OK**.

Related Topics

Work with E-mail Activities 187
Manage Activities 23
Sending and Receiving E-mail in Microsoft Dynamics CRM for Outlook 185

Assign to Queue or User Form

Use this form to assign an activity to another queue or user.

Can I do this task?

If the **Assign** button is not visible on the toolbar, the security role assigned to your account does not have permission to assign this type of record. To check your permissions for a specific record, open the record, click the **File menu** button , and then click **Properties**.

More information about specific permissions and performing this task while offline: Common Task Permissions

1. Navigate to activity records.

   In the Navigation Pane, click **Workplace**, and then under **My Work** click **Activities**.

   - OR -

   To work with activities associated with a record, open the record and then click **Activities**.
2. In the list of records, select the record that you want.

   Or, select multiple records

   - Select several records by pressing the CTRL key while you click each record.
   - Select a sequence of records by clicking the first record that you want, and then press the SHIFT key while you select the last record that you want.
   - Select all records on the page by selecting the **Select/clear all records on this page** check box at the top of the list.

   By default, the Microsoft Dynamics CRM Web application displays 50 records per page. You can increase this up to a maximum of 250 records per page to increase the number of records you can select at one time. To increase the number of records displayed per page:

   1. On the **File** menu, click **Options**.
   2. On the **General** tab, in the **Records Per Page** list, select the number of records to display per page.
   3. Click **OK**.

This changes the number of items that is displayed for all lists, which may slow response time when you switch record types. Therefore, you might want to set it back to a smaller number when you are done with this bulk action.

3. In the **Collaborate** group, click **Assign**.
4. In the **Assign to Team or User** dialog box, type all or part of the queue or user name, and then click the **Lookup** button .
5. In the **Look Up Records** dialog box, in the **Look for** list, select the type of record you want to find.
6. In the **Search** box, type the first few letters of the name of the record to narrow your search, and then click the **Find** button .
7. In the list of records, select the check boxes for the records that you want to add, click **Add**, and then click **OK**.
8. On the **User or Queues** form, click **OK**.

Related Topics

Share or Assign Records and Views 52
Manage Activities 23

Work with Integrated Instant Messenging

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

If you have Microsoft Office Communicator 2007, MSN Messenger, or Live Messenger installed, you can send an instant message to any user, contact, opportunity, or lead in Microsoft Dynamics CRM with an e-mail address and using one of the instant messaging applications listed.

Note
You may need to add the Microsoft Dynamics CRM server URL to the list of Internet Explorer trusted sites for the online presence to display. See online Help in Internet Explorer for instructions.

Record types and columns that can display online presence

- Contact records: **Full Name**
- Lead records: **Primary Contact**
- Opportunity records: **Potential Customer**
- All customer records: **Users**
- All customer records: **Owner**
- All customer records: **Modified By**

To access the menu, click the **Online Presence Jewel** .

- A green jewel indicates the person can receive an instant message and is available.
- A red jewel indicates the person is busy. You can send a message, but they may not respond immediately.
- A yellow jewel indicates the person is away or out of the office.
- A orange jewel indicates the person's online status is unknown. There are other communication methods available from the menu.

Enabling online presence

There are two ways to enable the online presence for a personal view. Adding the associated e-mail address for a user or contact enables online presence on the related column. For example, adding the owner's e-mail column to a view enables the presence on the owner column.

If you do not want to include the e-mail column, you can also customize the view to enable online presence.

These two example procedures describe how to add a presence to a saved view. If you have the correct permissions, you can also edit a system view for an entity to enable the presence. More information: Work with Views

To add an e-mail column to a saved view

a. In the list view you want to add online presence, click **Advanced Find**.

b. In the **Advanced Find** form, click **Edit Columns**.

c. In **Common Tasks**, click **Add Columns**

d. Select one of the e-mail related check boxes. For example, select **E-mail**.

e. Click **OK** twice.

f. In the **Advanced Find** form, click **Find**.

To save the view, click **Back to Query**, and then, on the Actions toolbar, click **Save As**.

To enable the online presence on a column in a saved view

a. In the Accounts or Contacts area, click **Advanced Find**.

b. In the **Advanced Find** form, click **Edit Columns**.

c. Do one of the following:

   a. Select one of the columns that can display online presence, such as **Full Name** and then click **OK**.

   b. Select the **Full Name** column, and then click **Change Properties**.

   c. Select the **Enable Presence for this column** check box, and then click **OK**.

   d. To save your changes and close the dialog box, click **OK**.

   e. In the **Advanced Find** form, click **Find**.

   To save the view, click **Back to Query**, and then on the Actions toolbar, click **Save As**.

Note

You cannot enable presence on columns for related record types or on deleted columns.

Related Topics

Understanding Entities 517

Managing E-mail Activities

You can create, preview, track, and save e-mail messages and relate them to the specific accounts, contacts, cases, and other records. These e-mail messages are tracked as activity records, and can be sent to customers and other internal users, or saved as drafts for future editing. This helps you create a complete history of your interaction with your customers.

More information:

- Managing Communication Activities
- *Understanding Quick Campaigns* (on page 382)
- *Creating and Using Workflows* (on page 223)
- Send Direct E-mail to Customers
- Creating Queues for Incoming Cases

Working with E-mail Messages Microsoft Dynamics CRM

If your System Administrator has set up Microsoft Dynamics CRM to manage your e-mail, you can receive, read, reply, forward, and attach files and notes to e-mail messages.

- You cannot resend sent e-mail messages.
- You cannot use quick campaigns or marketing lists to send e-mail to customers who have opted out of receiving marketing messages.
- E-mail messages may be addressed to customers for whom you do not have a valid e-mail address or who have an e-mail address that is associated with more than one record, but doing so may cause an alert to appear.
- Your System Administrator can make settings to manage how Microsoft Dynamics CRM manages e-mail messages without a valid Microsoft Dynamics CRM customer record.
- You can attach notes and documents to an e-mail message after you save it.

Working with E-mail Activities in Outlook

If you prefer to work with your e-mail activities in Outlook, you can create and manage e-mail messages using Microsoft Dynamics CRM for Outlook. By using the Microsoft Dynamics CRM Address Book in Outlook, you have access to the e-mail addresses of your customers and other users in your organization.

More information: *Sending and Receiving E-mail in Microsoft Dynamics CRM for Outlook* (on page 185)

You can save all or some of your Outlook e-mail messages as Microsoft Dynamics CRM records. Microsoft Dynamics CRM for Outlook can check incoming e-mail for messages to save and track. This option can be set in the Personal Options dialog box. More information: *Set Personal Options* (on page 201)

Personal and Organization-wide E-mail Templates

Microsoft Dynamics CRM provides e-mail templates for the organization. Organization templates are available for general use, but only users who have the appropriate administrator privileges can delete or edit them. Microsoft Dynamics CRM also gives users personal e-mail templates. Even when a personal template is available for general use, only the person who has ownership rights to a personal template can delete or edit it.

More information: *Work with E-mail Templates* (on page 187), Work with Mail Merge Templates

Sending and Receiving E-mail in Microsoft Dynamics CRM for Outlook

When you are working in Microsoft Dynamics CRM for Microsoft Office Outlook, you can use all the familiar Outlook buttons and toolbars with the Microsoft Dynamics CRM toolbar, menu, or tab to manage e-mail messages and most other activities.

At any time, you can track an Outlook e-mail message in Microsoft Dynamics CRM. Tracked messages still appear in the Outlook mail folders. By default, tracked messages display a Microsoft Dynamics CRM symbol. A copy of the e-mail message is saved as an activity and is available in the Microsoft Dynamics CRM Activities area. You can link the activity to a record in Microsoft Dynamics CRM. You can also set your personal options so that all incoming e-mail is tracked in Microsoft Dynamics CRM.

More information: *Set Personal Options* (on page 201)

> **Important**
> Because Microsoft Dynamics CRM shares data between users, many of the default privacy assumptions of a full e-mail system do not apply. This means that an e-mail activity that is associated with a Microsoft Dynamics CRM record (for example, a case, account, or contact) has the same visibility as any other activity associated with that record. Any user who has access to the record and its associated activities also has access to the e-mail message.

Managing Incoming E-mail

When you use Microsoft Dynamics CRM for Outlook, all the e-mail you receive arrives in your Outlook Inbox. Only e-mail messages that originated as a Microsoft Dynamics CRM e-mail activity (that is, a response to e-mail message you send from Microsoft Dynamics CRM) or that is marked as tracked in Microsoft Dynamics CRM, arrives in the Microsoft Dynamics CRM Activities and My Work: Queues area. If you prefer, you can:

- Track all incoming e-mail messages as Microsoft Dynamics CRM e-mail activities.
- Track only e-mail messages that originated in Microsoft Dynamics CRM (that is, e-mail sent in response to a Microsoft Dynamics CRM e-mail activity) into Microsoft Dynamics CRM e-mail activities.
- Track only e-mail messages related to your accounts, contacts, or leads.
- Track e-mail messages related to all Microsoft Dynamics CRM and custom record types that contain an e-mail field.

Note

More than one custom record type could contain the same e-mail address. When this happens, Microsoft Dynamics CRM links the e-mail messages that are received from this e-mail address to the custom record type that was created first. For example, a Patient record type that was created in January lists the e-mail address someone@example.com. A Doctor record type created in February also lists the same e-mail address. Microsoft Dynamics CRM links the e-mail messages received from someone@example.com only to the Patient record type. Sending an e-mail message to someone@example.com links the e-mail message to the Patient record type and the Doctor record type.

If you choose not to track all incoming e-mail messages, you can manually track selected messages in Outlook as e-mail activities in Microsoft Dynamics CRM.

If you track all your e-mail messages as Microsoft Dynamics CRM e-mail activities, they can be accessed by anyone who has permission to view or work with your activities. Also, when you track an e-mail message with attachments to a Microsoft Dynamics CRM activity, the attachments are included in the activity. If you do not want these attachments to be available to other users, delete them from the e-mail activity.

More information: *Save Outlook Contacts, Tasks, and E-mail Messages as Microsoft Dynamics CRM Records* (on page 465)

Sending and Replying to E-Mail Messages

You can link Microsoft Dynamics CRM e-mail activities to active contacts, accounts, leads, facilities, equipment, queues, or users in Microsoft Dynamics CRM. You can select active Microsoft Dynamics CRM records with e-mail addresses from the Microsoft Dynamics CRM address book, which is installed automatically when you install Microsoft Dynamics CRM for Outlook. E-mail activities can also be tracked in Microsoft Dynamics CRM without being related to another record.

When you send, reply, or forward an e-mail message that is tracked as an e-mail activity, a closed activity is created for each account and contact referenced and displayed in the Activities area. Closed e-mail activities cannot be updated except to link them to a related Microsoft Dynamics CRM record. If a related record has not already been selected, you have the option of select one.

More information: *Managing E-mail Activities* (on page 184)

Working with Microsoft Dynamics CRM for Outlook Offline and Synchronizing with Microsoft Dynamics CRM

If you install Microsoft Dynamics CRM for Outlook, you have the option of working offline from the Microsoft Dynamics CRM server. You can create Microsoft Dynamics CRM e-mail messages that are sent when you go back online with the Microsoft Dynamics CRM server. If you send Outlook e-mail messages, those are sent immediately if you have network access for sending e-mail.

More information: *Synchronizing Information* (on page 484)

When working with Microsoft Dynamics CRM for Outlook offline, a sent e-mail message can fail to be delivered or can be blocked. This can happen because the recipient does not want to receive the e-mail message or the mail server is down. If this happens, Outlook saves the e-mail message to your **Drafts** folder,

but Microsoft Dynamics CRM creates a closed activity. In Microsoft Dynamics CRM, use the Pending E-mail view to see unsent messages.

When you are working offline, Microsoft Dynamics CRM e-mail messages that you send are saved to your Outlook offline queue. When you go online, Microsoft Dynamics CRM automatically tries to send them and create the activities. If an e-mail message cannot be sent, Microsoft Dynamics CRM saves it as a draft activity, but it does not appear in your **Drafts** folder in Outlook.

More information: *Working Offline* (on page 486)

Using the Microsoft Dynamics CRM Address Book

Use the Microsoft Dynamics CRM address book to select Microsoft Dynamics CRM records in Outlook. The address book includes accounts, contacts, facilities and equipment, leads, queues, and users. Access and use the Microsoft Dynamics CRM address book using the same menu as your other Outlook address books.

The address book is used to reconcile e-mail recipients in incoming messages to Microsoft Dynamics CRM contacts and link them automatically. How the contacts are matched is set in your personal options.

More information: *Set Personal Options* (on page 201)

Work with E-mail Activities

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: E-mail Permissions

You can create and send e-mail activities in Microsoft Dynamics CRM from the **Activities** area. E-mail messages that are sent from Microsoft Dynamics CRM do not appear in the Microsoft Dynamics CRM mail folders in Outlook, unless synchronization is set up.

1. Start Microsoft Dynamics CRM.
2. In the Navigation Pane, click **Workplace**, and then click **Activities**.
3. On the **Activities** tab, in the **New** group, click **E-mail**.
4. On the **E-mail** tab, enter the following information:

   - **From**

     Locate and select the sender's name.

   - **To**

     Locate and select one or more recipients. You can click the **Lookup** button to search for and select records.

   - **Subject**

     Type a subject for your e-mail message.

   - **Duration**

     This field is not required, but if you are tracking the amount of time spent on cases, and this message is related to a case, enter the amount of time spent on this message.

   - **Due**

If you are not sending your e-mail message immediately, enter a date to complete and send the message. The message is not sent automatically.

Tip

- You can copy and paste content from Microsoft Office Word. This lets you take advantage of features such as spelling check and some text formatting. If your text is double-spaced, you can press SHIFT+ENTER to single-space lines of text.
- You can include an image if the file is hosted on a public Web site. Use the copy and paste feature of Microsoft Internet Explorer to include a link to the image in the message. The image is displayed as long as the receipient has access to the Web site.

You can also attach an article, template, or file to an e-mail activity.

To attach an article

a. To look up and select an article, on the Formatting toolbar, click **Insert Article**.

b. Use the **Search** tab to specify conditions or criteria to locate the article.

c. In the results list, select the article, and then click **OK**.

The article appears the body of in your e-mail message.

d. Type any additional text, or edit the article.

To attach an e-mail template

a. To look up and select an e-mail template, click **Insert Template**.

b. On the **Insert Template** dialog box, select the template you want to use. You can either use a global template, or a template specific to the record type you selected as the recipient. For example, account or customer.

c. Click **OK**.

The template appears in the body of your e-mail message and the subject line is updated with the subject line of the template.

d. Type any additional text or edit the text provided. Editing the text or subject line in the message does not change the template.

To attach a file

a. Save the activity.

b. On the **Attachments** tab, click **New E-mail Attachment**.

c. In the **Add Attachment** dialog box, in the **File Name** box, type the name of the file, or click **Browse** to locate the file that you want to attach.

d. Click **Attach**.

5. To send the message immediately, click **Send**.

The message is sent and the new closed activity appears in Microsoft Dynamics CRM in the **Activities** area with an assigned message number appended to the subject. It also appears in Outlook in the Sent Items folder.

- OR -

To send the message at a later time, click **Save and Close**. The new draft activity appears in Microsoft Dynamics CRM in the **Activities** area. You can delete draft messages.

Important

After you save your e-mail message as a Microsoft Dynamics CRM e-mail activity, the saved message can be accessed by anyone who has access to your activities in Microsoft Dynamics CRM.

Notes

- You can view the sent date of an e-mail message on the **Activities** list. The **Actual End Date** is the date the message was sent and closed.
- You can forward or reply to an e-mail activity, but you cannot resend it.

  To reply to only the original sender, open the e-mail message. In the **Respond** group, click **Reply**.

  To reply to the original sender and to send copies to everyone who originally received the message, click **Reply All**.

  To forward the e-mail activity to new recipients, click **Forward**, and then select new recipients.
- There is no spell check built into Microsoft Dynamics CRM. There might be third-party solutions available. For more information, visit *Microsoft Dynamics CRM Solution Finder* (see Microsoft Dynamics CRM Solution Finder - *http://go.microsoft.com/fwlink/?LinkId=98752*).

Related Topics

Work with E-mail Activities 187
Create an Activity in Outlook 460
Manage Activities 23
Send Direct E-mail to Customers 171
Save Outlook Contacts, Tasks, and E-mail Messages as Microsoft Dynamics CRM Records 465
Sending and Receiving E-mail in Microsoft Dynamics CRM for Outlook 185
Work with E-mail Templates 187
Managing E-mail Activities 184

Create an e-mail message in Outlook

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: E-mail Permissions

You can create e-mail messages in Microsoft Office Outlook by using either the Microsoft Dynamics CRM forms or the Outlook forms. By default, an e-mail message that has been marked for tracking is synchronized in Microsoft Dynamics CRM for Outlook and Microsoft Dynamics CRM, and when you reply to or forward an e-mail message from it, the Outlook form opens.

1. Start Outlook. (Microsoft Dynamics CRM for Outlook must be installed.)
2. Do one of the following:

Create an e-mail message in an Outlook form

3. On the Microsoft Office Outlook Standard toolbar, click **New**.
4. In the **New** menu, click **Mail Message**.
5. In the Outlook form, you can use either your Outlook contacts or your Microsoft Dynamics CRM contacts. For more information, see Microsoft Office Outlook Help.
6. On the Microsoft Dynamics CRM toolbar, click **Track in CRM**.

   After you send the message, the **View in CRM** button becomes available.
7. Do one of the following to locate and select a parent record to link to this record:
   - In Microsoft Office Outlook 2003, click **Regarding**.
   - In Microsoft Office Outlook 2007, click **Set Parent** or **Set Regarding**.
8. On the **Outlook** toolbar, click **Send**.

   The e-mail message appears in your Microsoft Dynamics CRM folders. The icon changes to the **Track in CRM** button . The sent e-mail activity is saved as a Microsoft Dynamics CRM e-mail activity and appears in the Microsoft Dynamics CRM Activities area.

   An e-mail activity is not created until the message is sent.

   To view the contact record, on the Microsoft Dynamics CRM toolbar click, **View in CRM**.

   Create an e-mail message in a Microsoft Dynamics CRM form

   This procedure does not create an Outlook e-mail message. These e-mail messages only appear in the Microsoft Dynamics CRM for Outlook folders and do not appear the Outlook **Sent Items** folder.

   You can edit a draft e-mail message by following steps 1 through 2 to navigate to the Activities area in Microsoft Dynamics CRM for Outlook. Then, open the record you want to edit.
9. In the Outlook Navigation Pane, click the button for your organization, and then expand **Workplace**.
10. Under **Workplace**, expand **My Work**, and then click **Activities**.
11. In the Activities area, on the **Actions** menu, click **New**.
12. In the **New Activity** dialog box, click **E-mail**, and then click **OK**.
13. On the **E-mail** tab, enter the following information:
    - **From**

      Locate and select the sender's name.
    - **To**

      Locate and select one or more recipients. You can click the **Lookup** button to search for and select records.
    - **Subject**

      Type a subject for your e-mail message.
    - **Duration**

This field is not required, but if you are tracking the amount of time spent on cases, and this message is related to a case, enter the amount of time spent on this message.

- **Due**

  If you are not sending your e-mail message immediately, enter a date to complete and send the message. The message is not sent automatically.

Tip

- You can copy and paste content from Microsoft Office Word. This lets you take advantage of features such as spelling check and some text formatting. If your text is double-spaced, you can press SHIFT+ENTER to single-space lines of text.
- You can include an image if the file is hosted on a public Web site. Use the copy and paste feature of Microsoft Internet Explorer to include a link to the image in the message. The image is displayed as long as the receipient has access to the Web site.

You can also attach an article, template, or file to an e-mail activity.

To attach an article

e. To look up and select an article, on the Formatting toolbar, click **Insert Article**.

f. Use the **Search** tab to specify conditions or criteria to locate the article.

g. In the results list, select the article, and then click **OK**.

The article appears the body of in your e-mail message.

h. Type any additional text, or edit the article.

To attach an e-mail template

i. To look up and select an e-mail template, click **Insert Template**.

j. On the **Insert Template** dialog box, select the template you want to use. You can either use a global template, or a template specific to the record type you selected as the recipient. For example, account or customer.

k. Click **OK**.

The template appears in the body of your e-mail message and the subject line is updated with the subject line of the template.

l. Type any additional text or edit the text provided. Editing the text or subject line in the message does not change the template.

To attach a file

m. Save the activity.

n. On the **Attachments** tab, click **New E-mail Attachment**.

o. In the **Add Attachment** dialog box, in the **File Name** box, type the name of the file, or click **Browse** to locate the file that you want to attach.

p. Click **Attach**.

14. To send the message immediately, click **Send**.

The message is sent and the new closed activity appears in Microsoft Dynamics CRM in the **Activities** area with an assigned message number appended to the subject. It also appears in Outlook in the Sent Items folder.

- OR -

To send the message at a later time, click **Save and Close**. The new draft activity appears in Microsoft Dynamics CRM in the **Activities** area. You can delete draft messages.

Important: If you are working offline, e-mail messages will not be sent until you go back online. The status will still be **Closed**. You can view a list of unsent e-mail from the Activities list, with the **My Pending E-mails** view.

Important
After you save your e-mail message as a Microsoft Dynamics CRM e-mail activity, the saved message can be accessed by anyone who has access to your activities in Microsoft Dynamics CRM.

Notes

- After a message is sent, the status is changed to **Closed** and displayed in Microsoft Dynamics CRM in the **Activities** pane. You cannot change the status or edit the message, except to link a record in the **Regarding** box, if one has not been selected.
- You can forward or reply to an e-mail activity, but you cannot resend it.

To reply to only the original sender, open the e-mail message. In the **Respond** group, click **Reply**.

To reply to the original sender and to send copies to everyone who originally received the message, click **Reply All**.

To forward the e-mail activity to new recipients, click **Forward**, and then select new recipients.

Related Topics

Work with E-mail Activities 187
Create an Activity in Outlook 460
Save Outlook Contacts, Tasks, and E-mail Messages as Microsoft Dynamics CRM Records 465
Sending and Receiving E-mail in Microsoft Dynamics CRM for Outlook 185
Managing E-mail Activities 184
Requesting User Interface Changes 220

Create a quick campaign to run as activity

Can I do this task?

This task requires permissions that are found in all default marketing security roles. More information about specific permissions and performing this task while offline: Marketing Permissions

You can use quick campaigns to create one type of activity for many accounts, contacts, or leads at once.

1. Select the records or list that you want to run a quick campaign on, and then start the Create Quick Campaign Wizard.

   From a list of records, including the results of a search

   You can run a quick campaign from any list of accounts, contacts, or leads.

   a. Select the record or records for which you want to create a quick campaign. If you want to include all records on the current page or all records on all pages, then skip this step.

   q. On the Actions toolbar, click **Create Quick Campaign** , and then click one of the following:

      - **For Selected Records**

        Select this option if you have selected one or more records in the list.

      - **For All Records on Current Page**

        Select this option to include all records on the page for the quick campaign activity.

      - **For All Records on All Pages**

        Select this option to include all records on all pages for the quick campaign activity.

   From the Marketing Lists list

   You can run a quick campaign on one or more marketing lists in the **Marketing Lists** list.

   a. In the Navigation Pane, click **Marketing** or **Sales**, and then click **Marketing Lists**.

   r. Select the marketing list or marketing lists for which you want to create a quick campaign.

   s. On the Actions toolbar, click **Create Quick Campaign**, and then click **For Selected Records**.

   From a marketing list

   You can run a quick campaign on the accounts, contacts, or leads in any marketing list.

   a. In the Navigation Pane, click **Marketing** or **Sales**, and then click **Marketing Lists**.

   t. Double-click the marketing list for which you want to create a quick campaign.

   u. On the Actions toolbar, click **Create Quick Campaign**.

2. In the Create Quick Campaign Wizard, follow the instructions to create the quick campaign.

   Notes

   - You cannot add additional records to a quick campaign after you have created it.
   - In the Create Quick Campaign Wizard, you can select who you want Microsoft Dynamics CRM to assign the activity to and whether Microsoft Dynamics CRM should perform the activity automatically for appropriate activities (such as sending e-mail messages). For example, if you are creating a phone call activity for all of the sales representatives, you can select the phone call activity, and then select **The owners of the records that are included in the quick campaign**. Each sales representative can then see the activity and take action on it. However, if you are creating a large number of e-mail activities that Microsoft Dynamics CRM will perform automatically, you can assign the e-mail activity to yourself instead of the record owners.
   - Whether or not some activities are performed automatically depends on an option available to users who have the Organization Settings Write privilege. More information: Manage System Settings

Related Topics

Work with Quick Campaigns 382
Creating and Managing Marketing Lists 387
Planning Campaigns 375
Understanding Quick Campaigns 382

Resolve red text in e-mail message addresses

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: E-mail Permissions

E-mail messages that appear as red text with the **Unresolved Address** button cannot be matched to records in Microsoft Dynamics CRM. These messages contain e-mail addresses that are either not related to a user, account, contact, or lead record, or are related to multiple records. You can match the e-mail address to an existing record or create a new record.

1. Open the message.
2. Double-click the unresolved e-mail address.
3. In the **Resolve Address** dialog box, do one of the following procedures:

   If the e-mail address belongs to an existing user, account, contact, or lead

   - Click **Resolve to an existing record**. Click the **Lookup** button to search for records.

   If the e-mail address is not in the system

   v. Click **Resolve to a new record**, select a record type, and then click **Go**.

   w. Complete the form, and then click **OK**
4. Click **OK**.

Related Topics

Work with E-mail Activities 187
Sending and Receiving E-mail in Microsoft Dynamics CRM for Outlook....185

Set the option to send and receive e-mail from a user or queue

Can I do this task?

This task requires a manager, vice president, CEO-Business Manager, System Administrator, or System Customizer security role or equivalent permissions. More information about specific permissions and performing this task while offline: E-mail Permissions

If this option is not set correctly, e-mail is not sent and a warning message "This message has not been submitted for delivery" appears.

1. In the Navigation Pane, click **Settings**, click **Administration**, and then click **Users**.

   - OR -

   In the Navigation Pane, click **Settings**, click **Business Management**, and then click **Queues**.
2. Open the user or queue you want to modify.
3. Under **E-mail Access Configuration**, select how e-mail will be accessed for incoming and outgoing mail.
   - **None**

     E-mail will not be sent or received.
   - **Forward Mailbox**

     E-mail will be forwarded from another e-mail address.
   - **Microsoft Dynamics CRM for Outlook**

     E-mail is sent and received with Microsoft Dynamics CRM for Outlook.
   - **E-mail Router**

     E-mail is sent and received with the Microsoft Dynamics CRM E-mail Router. If this item is selected, the **Allow credentials** check box is displayed. To require that credentials be entered, select the check box.
4. Click **Save** or **Save and Close**.

Notes

- If you have selected an e-mail option, verify that there is a valid e-mail address in the **E-mail** box.
- If you select **Microsoft Dynamics CRM for Outlook** as your e-mail option, you must also allow Microsoft Dynamics CRM to send mail through Microsoft Dynamics CRM for Outlook.

Related Topics

Work with E-mail Activities 187
Managing E-mail Activities 184

Convert an e-mail to another record type

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

1. Navigate to activity records.

   In the Navigation Pane, click **Workplace**, and then under **My Work** click **Activities**.

   - OR -

   To work with activities associated with a record, open the record and then click **Activities**.

2. Open the e-mail activity that you want to convert.
3. In the Actions toolbar, point to **Convert Activity**, and then click the record type that you want to convert to.
4. In the dialog box, type the appropriate information.
5. By default, Microsoft Dynamics CRM is set to perform specific operations when the conversion occurs. To change the conversion operations, clear the associated check boxes.
6. Click **OK**.

Related Topics

Work with E-mail Activities 187
Manage Activities 23
Sending and Receiving E-mail in Microsoft Dynamics CRM for Outlook..... 185

Convert an activity to a case

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

1. Navigate to activity records.

   In the Navigation Pane, click **Workplace**, and then under **My Work** click **Activities**.

   - OR -

   To work with activities associated with a record, open the record and then click **Activities**.
2. Open the activity that you want.

   Activity types that can be converted

   - Faxes
   - Phone Calls
   - E-mail Messages
   - Letters
   - Appointments
3. On the Actions toolbar, point to **Convert Activity** and then to **Case**.
4. In the **Convert Activity to Case** dialog box, enter information in the following boxes:

   - **Customer**

     You must click the **Lookup** button to select or create a new customer.
   - By default, Microsoft Dynamics CRM automatically completes the following operations during the conversion:

- Close the activity as completed.
- Open the new case after the conversion.

To change the conversion operations, clear the associated check boxes.

5. In the **Convert Activity to Case** dialog box, click **OK**.

Note

The originating activity becomes a related activity for the new case. If the activity is open, it appears in the **Activities** list for the case. If the activity is closed, it appears in the **Closed Activities** list.

Related Topics

Work with Appointments 440
Work with E-mail Activities 187
Manage Activities 23

Work with E-mail Templates

E-mail templates provide boilerplate text and Microsoft Dynamics CRM data for e-mail messages. These templates cannot be used with Microsoft Office Word mail merges.

Concepts:

- *Managing E-mail Activities* (on page 184)
- Work with Mail Merge Templates

Create or edit an e-mail template

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: E-mail Permissions

An e-mail template is attached to an e-mail activity after the activity is created. Typically, the template that can be attached to an e-mail depends on which type of record the template is related to. For example, you can only attach a case e-mail template to an e-mail activity created from a case record. However, you can also create global templates that are available for any record type. In addition, you can create personal templates that are available only to you, or organizational templates that are available to anyone in your organization.

Notes

- This feature is not available in Microsoft Dynamics CRM for Outlook. Use Microsoft Office Word mail merge templates instead. More information: *Create Customer-Ready Documents and Messages* (on page 164)
- You can add attachments to an e-mail message template or any e-mail message created with an e-mail template, such as a direct e-mail or a quick campaign. To add an attachment to an e-mail template, you must first save the template.

1. Do one of the following.

   To work with organization templates

   - In the Navigation Pane, click **Settings**, click **Templates**, and then click **E-mail Templates**.

   - OR -

   To work with personal templates

   - On the **Tools** menu, click **Options**, and then click the **E-mail Templates** tab.

2. On the Actions toolbar, click **New**.
3. In the **E-Mail Template Type** dialog box, in the **Template Type** list, select the type, and then click **OK**.

   Important
   If you choose a specific record type, such as lead or opportunity, the template is available only for that record type. This cannot be changed. To use the same content for another record type, create a new template.

4. On the **E-mail Templates** form, you must enter the following information:

   - **Title**

     Type a meaningful and descriptive title for the template. The title displays in the list of templates.

   - **Subject**

     Type the subject of the e-mail message created with this template. This appears as the Subject line in the e-mail message and overwrites the existing text.

5. You can type a description of the template. This is not displayed to the recipient.
6. Type the text you want to send in this message. Use the Formatting toolbar to edit the text.

   Tips

   - Although you cannot insert images or HTML directly into Microsoft Dynamics CRM e-mail messages or e-mail templates, you can use the copy feature in Internet Explorer to copy an image from a Web site and paste it into the e-mail message or e-mail template. The image is available as long as the Web site is accessible.
   - To include a hyperlink in an e-mail template, type the URL including the http://, for example, http://www.microsoft.com and then press Enter. Do not include a period or comma or a space after the URL, or the link will break. A link is automatically added to the URL and the text is underlined and changed to blue.
   - There is no spell check built into Microsoft Dynamics CRM. There might be third-party solutions available. For more information, visit *Microsoft Dynamics CRM Solution Finder* (see Microsoft Dynamics CRM Solution Finder - *http://go.microsoft.com/fwlink/?LinkId=98752*).
   - The Formating toolbar has limited fonts and font sizes. However, you can copy and paste content from Microsoft Office Word. This allows you to take advantage of features such as spell checking and some advanced text formatting. To single-space a line of text, at the end of the line press Shift+Enter.

7. To insert data fields to display information such as a customer's name or data from a quote, from a Microsoft Dynamics CRM record, click **Insert**/**Update**, and then in the **Data Field Values** dialog box, click **Add**.
8. In the **Add Data Value** dialog box, select the **Record type** and **Field**, and then click **OK**.
9. Click **OK** again to insert the data.

   Tip

Use the **Default Text** box to define what text is displayed if the record does not have data for the field.

10. Click **Save** or **Save and Close**.
11. If necessary, click **OK** to close the **Set Personal Options** dialog box.

    Notes

    - To change a shared template to a personal one or a personal template to a shared one, on the template form, on the **Actions** menu, click **Revert to Personal Template** or click **Make Template Available to Organization**.
    - If you use an e-mail template as a signature in addition to another template, insert the signature template first, otherwise, the Subject line will be overwritten.
    - If you need to back up your templates, or export them for use in a different implementation of Microsoft Dynamics CRM, you can export them as part of exporting customizations. More information: Export a solution

Related Topics

Work with E-mail Templates 187
Set Personal Options 201
Work with E-mail Activities 187
Managing E-mail Activities 184
Sending and Receiving E-mail in Microsoft Dynamics CRM for Outlook 185
Requesting User Interface Changes 220

Add and edit the data fields in an e-mail template

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: E-mail Permissions

Data fields are used with e-mail templates in the Web application. You can use custom fields, attributes, and entities with e-mail templates.

This procedure does not work for Microsoft Office Word mail merge templates. You can use Microsoft Office Word templates.

1. In the e-mail template, on the Form toolbar, click **Insert**/**Update**.
2. In the **Data Field Values** dialog box, do one of the following:

- To add a field, click **Add**, and then in the **Add Data Value** dialog box, select the record type and field that you want to add, and then click **OK**.

  The field appears in the **Data Field Values** list.
- To change the order in which your data fields appear, select the field, and then click **Move Up** or **Move Down**.
- To provide substitute text for a field if there is no data, select the field, and then in the **Default Text** box, type the text.
- To remove a data field value, select the field, and then click **Delete**.
- To insert the data field values into the e-mail template, click **OK**.

3. You can change the format for text displayed in a data field. Select the field, double-click the text, then highlight the yellow text in the field, and then make the changes you want.
4. Click **Save** or **Save and Close**.

Important

- If you want multiple data fields to appear on your template, you must add each data field individually and for one record type at a time.
- If you want to include data from different record types, repeat step 2 and select a different record type.

Related Topics

Work with E-mail Templates....187
Managing E-mail Activities....184
Sending and Receiving E-mail in Microsoft Dynamics CRM for Outlook....185

Configuring Personal Options

Viewing Your User Information

In Microsoft Dynamics CRM you can view your personal information in your own profile, although you my not be able to update it. This information includes your name, contact information, working hours, the teams and resource groups you belong to, as well as the services you can perform. You can also review your security roles. Understanding your security role is key to knowing what you can and cannot view, create, or edit in Microsoft Dynamics CRM.

Personalizing Microsoft Dynamics CRM

Every user has the option of configuring his or her personal workspace within Microsoft Dynamics CRM. You can change how Microsoft Dynamics CRM displays information, including:

- What links appear in your **Workplace**.
- How many records display in lists.

- Your language preferences.
- How to display numbers and dates.

More information: View Your User Profile

Creating Personal Views

You can create personal views of lists by creating custom Advanced Find queries and then saving them as views.

More information: *Find Things* (on page 9)

Managing Your E-mail

You can create personal e-mail templates that you can reuse with your e-mail messages. If you are using an e-mail service other than Microsoft Dynamics CRM for Microsoft Office Outlook, you can update your e-mail password.

More information: *Managing E-mail Activities* (on page 184)

Synchronizing with Microsoft Dynamics CRM

If you use Microsoft Dynamics CRM for Outlook, you can change how Microsoft Dynamics CRMlooks for you as well as what information is synchronized and how often.

More information: *Synchronizing Information* (on page 484)

Set Personal Options

You can set your personal options for Microsoft Dynamics CRM and Microsoft Dynamics CRM for Outlook. Not all options are available for both the Web application and Microsoft Dynamics CRM for Outlook.

Although you can use **Advanced Find** to create personal views, you cannot set a personal view as your personal default view for a list.

More information: Work with Views and Work with Advanced Find

View Your User Profile

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

Your user profile displays information about you, including general information such as your contact information and addresses, what teams and resource groups you belong to, which services you can perform, and your work hours and security roles. This information is visible to the entire organization. Depending on your security role, you may be able to make changes to your user profile.

If you are working in Microsoft Dynamics CRM for Outlook, you can view this information from the User form. More information: Work with Your User Record and Work Hours

1. Click the **File** tab, and then click **Options**.
2. In the **Set Personal Options** dialog box, click the **General** tab.
3. At the bottom of the page, click the **View your user information** link.

   The User form with your information opens.
4. To view details or make changes, under **Common** or **Service** click any of the following:
   - Teams
   - Roles
   - Quotas
   - Work Hours
   - Services
   - Resource groups
   - Workflows
5. To close the form, on the **File** menu, click **Close**.
6. To close the **Set Personal Options** dialog box, click **OK**.

Related Topics

Check Your Permissions for a Record 50
Set Personal Options 201

Set start page and view options

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

You can update the options that determine how Microsoft Dynamics CRM displays information. Not all settings on this tab are available in Microsoft Dynamics CRM for Outlook.

1. Click the **File** tab, and then click **Options**.

   - OR -

   In Outlook, on the **CRM** menu, click **Options**.
2. In the **Set Personal Options** dialog box, on the **General** tab, you can set any of the following options:
   - **Select activity forms used by Microsoft CRM client for Outlook**

If you are using Microsoft Dynamics CRM for Outlook, select the forms that you want to use to create activities.

- **Default Pane**

  Select the area that you want to display when you open Microsoft Dynamics CRM. This option is not available in Outlook.

- **Default Tab**

  Select the tab that you want to display when you open Microsoft Dynamics CRM. This option is not available in Outlook.

- **Records Per Page**

  Select the number of records you want to display in a list. The number of records displayed can affect the performance of Microsoft Dynamics CRM.

- **Advanced Find Mode**

  Select the display mode for Advanced Find. This also affects Microsoft Dynamics CRM for Outlook data groups. The **Simple** mode only lets you change the values. The **Detailed** mode displays the Filter toolbar and lets you add additional criteria.

- **Time Zone**

  If you are in a different time zone than the rest of your organization, select the time zone for your current location. This option is not available in Outlook.

  If you are using the Microsoft Dynamics CRM for Outlook, we recommend that the Microsoft Dynamics CRM time zone be set to the same time zone as Outlook, otherwise issues with mismatched times and dates could occur.

- **Currency**

  Click the **Lookup** button to select the currency to display.

- **Enable high contrast**

  Select this check box if you have turned on High Contrast settings in either your browser or operating system. This option improves the display of buttons and icons for accessiblity.

- **View your user information**

  Click the **View your user information** link to view your user record in Microsoft Dynamics CRM. This option is not available in Outlook.

- **Always run the Microsoft Dynamics CRM application hoster process**

  Select this check box if you want Microsoft Dynamics CRM for Outlook to run continuously in the background, even if Outlook is not running. This will improve how quickly pages are displayed. This option is not available in the Web application.

3. To save your changes and close the dialog box, click **OK**.

Related Topics

Set Personal Options 201
Manage Activities 23
Requesting User Interface Changes 220

Set synchronization options in Microsoft Dynamics CRM for Outlook

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

You can select the record types that you want to synchronize between Outlook and Microsoft Dynamics CRM for Outlook and how often you want to synchronize them between applications. Filters enable you to specify the types of items that are synchronized.

1. Start Outlook. (Microsoft Dynamics CRM for Outlook must be installed.)
2. If you have Outlook 2007 installed, on the **CRM** menu, click **Options**.

   - OR -

   If you have Outlook 2010 installed, click **File**. Click the **CRM** tab, and then click **Options**.
3. In the **Set Personal Options** dialog box, click the **Synchronization** tab.

   This tab is not available in the Web application.
4. To choose other record types, such as Accounts, that are synchronized, click the **Outlook Filters** link, and then change and add the filters that you want. More information: Choose the types of Microsoft Dynamics CRM records and other items that synchronize with Outlook

   The filters that are provided with Microsoft Dynamics CRM for Outlook synchronize the following items if you are the owner of the item.

   - Recurring Appointments
   - Faxes
   - Tasks
   - Service Activities
   - Appointments. Appointments and service activities in which you are a participant and have accepted the appointment are synchronized.
   - Phone Calls
   - Letters

- Contacts

5. If you want to include company names in Outlook contacts, select the **Update Company fields with parent account names** check box.

   Important: Subsequent changes to the company name field are not synchronized.

6. If you have more than one computer running Microsoft Dynamics CRM for Outlook and this computer is online most often, select the **Set this computer to be the Synchronizing client** check box to automatically synchronize information between Outlook and Microsoft Dynamics CRM.

7. If you want to define how often Microsoft Dynamics CRM items in your Microsoft Dynamics CRM for Outlook folders are updated, select the **Synchronize the CRM items in my Outlook folders every** check box and then enter the number of minutes.

   You can increase the amount of time between synchronization of items in your Microsoft Dynamics CRM for Outlook folders.

   Your organization must permit you to change the **Synchronize the CRM items in my Outlook folders every** check box. Your administrator sets the minimum time allowed between synchronization.

8. To save your changes and close the dialog box, click **OK**.

Related Topics

Set Personal Options 201
Doing CRM Work in Outlook 459
Synchronizing Information 484

Set Workplace pane options

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

You can select which areas and record types are displayed in the Navigation Pane when you view your Workplace. By default, the My Work area and the Customers area appear in the Navigation Pane in both Microsoft Dynamics CRM and Microsoft Dynamics CRM for Outlook.

1. Click the **File** tab, and then click **Options**.

   - OR -

   In Outlook, on the **CRM** menu, click **Options**.

2. In the **Set Personal Options** dialog box, on the **Workplace** tab, select the areas you want to display. The Preview pane displays each area and its sub-areas.

   - **Sales**

     This area displays marketing lists, orders, invoices, leads, opportunity, and quotes.

- **Marketing**

  This area displays marketing lists, campaigns, and quick campaigns.

- **Service**

  This area displays cases, contracts, and the knowledge base.

- **Scheduling**

  This area displays the Service calendar.

  The option to select the **Scheduling** area is not available in the Microsoft Dynamics CRM for Outlook, but the area displays.

3. To save your changes and close the dialog box, click **OK**.

Related Topics

Set Personal Options 201
Manage Activities 23

View your user profile

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

Your user profile displays information about you, including general information such as your contact information and addresses, what teams and resource groups you belong to, which services you can perform, and your work hours and security roles. This information is visible to the entire organization. Depending on your security role, you may be able to make changes to your user profile.

If you are working in Microsoft Dynamics CRM for Outlook, you can view this information from the User form. More information: Work with Your User Record and Work Hours

1. Click the **File** tab, and then click **Options**.
2. In the **Set Personal Options** dialog box, click the **General** tab.
3. At the bottom of the page, click the **View your user information** link.

   The User form with your information opens.
4. To view details or make changes, under **Common** or **Service** click any of the following:
   - Teams
   - Roles
   - Quotas
   - Work Hours
   - Services

- Resource groups
- Workflows

5. To close the form, on the **File** menu, click **Close**.
6. To close the **Set Personal Options** dialog box, click **OK**.

Related Topics

Check Your Permissions for a Record 50
Set Personal Options 201

Set start page and view options

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

You can update the options that determine how Microsoft Dynamics CRM displays information. Not all settings on this tab are available in Microsoft Dynamics CRM for Outlook.

1. Click the **File** tab, and then click **Options**.

   - OR -

   In Outlook, on the **CRM** menu, click **Options**.
2. In the **Set Personal Options** dialog box, on the **General** tab, you can set any of the following options:

   - **Select activity forms used by Microsoft CRM client for Outlook**

     If you are using Microsoft Dynamics CRM for Outlook, select the forms that you want to use to create activities.
   - **Default Pane**

     Select the area that you want to display when you open Microsoft Dynamics CRM. This option is not available in Outlook.
   - **Default Tab**

     Select the tab that you want to display when you open Microsoft Dynamics CRM. This option is not available in Outlook.
   - **Records Per Page**

     Select the number of records you want to display in a list. The number of records displayed can affect the performance of Microsoft Dynamics CRM.
   - **Advanced Find Mode**

Select the display mode for Advanced Find. This also affects Microsoft Dynamics CRM for Outlook data groups. The **Simple** mode only lets you change the values. The **Detailed** mode displays the Filter toolbar and lets you add additional criteria.

- **Time Zone**

  If you are in a different time zone than the rest of your organization, select the time zone for your current location. This option is not available in Outlook.

  If you are using the Microsoft Dynamics CRM for Outlook, we recommend that the Microsoft Dynamics CRM time zone be set to the same time zone as Outlook, otherwise issues with mismatched times and dates could occur.

- **Currency**

  Click the **Lookup** button to select the currency to display.

- **Enable high contrast**

  Select this check box if you have turned on High Contrast settings in either your browser or operating system. This option improves the display of buttons and icons for accessiblity.

- **View your user information**

  Click the **View your user information** link to view your user record in Microsoft Dynamics CRM. This option is not available in Outlook.

- **Always run the Microsoft Dynamics CRM application hoster process**

  Select this check box if you want Microsoft Dynamics CRM for Outlook to run continuously in the background, even if Outlook is not running. This will improve how quickly pages are displayed. This option is not available in the Web application.

3. To save your changes and close the dialog box, click **OK**.

Related Topics

Set Personal Options 201
Manage Activities 23
Requesting User Interface Changes 220

Set synchronization options in Microsoft Dynamics CRM for Outlook

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

You can select the record types that you want to synchronize between Outlook and Microsoft Dynamics CRM for Outlook and how often you want to synchronize them between applications. Filters enable you to specify the types of items that are synchronized.

1. Start Outlook. (Microsoft Dynamics CRM for Outlook must be installed.)
2. If you have Outlook 2007 installed, on the **CRM** menu, click **Options**.

   - OR -

   If you have Outlook 2010 installed, click **File**. Click the **CRM** tab, and then click **Options**.
3. In the **Set Personal Options** dialog box, click the **Synchronization** tab.

   This tab is not available in the Web application.
4. To choose other record types, such as Accounts, that are synchronized, click the **Outlook Filters** link, and then change and add the filters that you want. More information: Choose the types of Microsoft Dynamics CRM records and other items that synchronize with Outlook

   The filters that are provided with Microsoft Dynamics CRM for Outlook synchronize the following items if you are the owner of the item.

   - Recurring Appointments
   - Faxes
   - Tasks
   - Service Activities
   - Appointments. Appointments and service activities in which you are a participant and have accepted the appointment are synchronized.
   - Phone Calls
   - Letters
   - Contacts
5. If you want to include company names in Outlook contacts, select the **Update Company fields with parent account names** check box.

   Important: Subsequent changes to the company name field are not synchronized.
6. If you have more than one computer running Microsoft Dynamics CRM for Outlook and this computer is online most often, select the **Set this computer to be the Synchronizing client** check box to automatically synchronize information between Outlook and Microsoft Dynamics CRM.
7. If you want to define how often Microsoft Dynamics CRM items in your Microsoft Dynamics CRM for Outlook folders are updated, select the **Synchronize the CRM items in my Outlook folders every** check box and then enter the number of minutes.

   You can increase the amount of time between synchronization of items in your Microsoft Dynamics CRM for Outlook folders.

   Your organization must permit you to change the **Synchronize the CRM items in my Outlook folders every** check box. Your administrator sets the minimum time allowed between synchronization.
8. To save your changes and close the dialog box, click **OK**.

Related Topics

Set Personal Options 201
Doing CRM Work in Outlook 459
Synchronizing Information 484

Set Workplace pane options

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

You can select which areas and record types are displayed in the Navigation Pane when you view your Workplace. By default, the My Work area and the Customers area appear in the Navigation Pane in both Microsoft Dynamics CRM and Microsoft Dynamics CRM for Outlook.

1. Click the **File** tab, and then click **Options**.

   - OR -

   In Outlook, on the **CRM** menu, click **Options**.

2. In the **Set Personal Options** dialog box, on the **Workplace** tab, select the areas you want to display. The Preview pane displays each area and its sub-areas.

   - **Sales**

     This area displays marketing lists, orders, invoices, leads, opportunity, and quotes.

   - **Marketing**

     This area displays marketing lists, campaigns, and quick campaigns.

   - **Service**

     This area displays cases, contracts, and the knowledge base.

   - **Scheduling**

     This area displays the Service calendar.

     The option to select the **Scheduling** area is not available in the Microsoft Dynamics CRM for Outlook, but the area displays.

3. To save your changes and close the dialog box, click **OK**.

Related Topics

Set Personal Options 201
Manage Activities 23

Create or edit an e-mail template

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: E-mail Permissions

An e-mail template is attached to an e-mail activity after the activity is created. Typically, the template that can be attached to an e-mail depends on which type of record the template is related to. For example, you can only attach a case e-mail template to an e-mail activity created from a case record. However, you can also create global templates that are available for any record type. In addition, you can create personal templates that are available only to you, or organizational templates that are available to anyone in your organization.

Notes

- This feature is not available in Microsoft Dynamics CRM for Outlook. Use Microsoft Office Word mail merge templates instead. More information: *Create Customer-Ready Documents and Messages* (on page 164)
- You can add attachments to an e-mail message template or any e-mail message created with an e-mail template, such as a direct e-mail or a quick campaign. To add an attachment to an e-mail template, you must first save the template.

1. Do one of the following.

   To work with organization templates

   - In the Navigation Pane, click **Settings**, click **Templates**, and then click **E-mail Templates**.

   - OR -

   To work with personal templates

   - On the **Tools** menu, click **Options**, and then click the **E-mail Templates** tab.

2. On the Actions toolbar, click **New**.
3. In the **E-Mail Template Type** dialog box, in the **Template Type** list, select the type, and then click **OK**.

   Important
   If you choose a specific record type, such as lead or opportunity, the template is available only for that record type. This cannot be changed. To use the same content for another record type, create a new template.

4. On the **E-mail Templates** form, you must enter the following information:

   - **Title**

     Type a meaningful and descriptive title for the template. The title displays in the list of templates.

   - **Subject**

     Type the subject of the e-mail message created with this template. This appears as the Subject line in the e-mail message and overwrites the existing text.

5. You can type a description of the template. This is not displayed to the recipient.

6. Type the text you want to send in this message. Use the Formatting toolbar to edit the text.

   Tips

   - Although you cannot insert images or HTML directly into Microsoft Dynamics CRM e-mail messages or e-mail templates, you can use the copy feature in Internet Explorer to copy an image from a Web site and paste it into the e-mail message or e-mail template. The image is available as long as the Web site is accessible.
   - To include a hyperlink in an e-mail template, type the URL including the http://, for example, http://www.microsoft.com and then press Enter. Do not include a period or comma or a space after the URL, or the link will break. A link is automatically added to the URL and the text is underlined and changed to blue.
   - There is no spell check built into Microsoft Dynamics CRM. There might be third-party solutions available. For more information, visit *Microsoft Dynamics CRM Solution Finder* (see Microsoft Dynamics CRM Solution Finder - *http://go.microsoft.com/fwlink/?LinkId=98752*).
   - The Formating toolbar has limited fonts and font sizes. However, you can copy and paste content from Microsoft Office Word. This allows you to take advantage of features such as spell checking and some advanced text formatting. To single-space a line of text, at the end of the line press Shift+Enter.

7. To insert data fields to display information such as a customer's name or data from a quote, from a Microsoft Dynamics CRM record, click **Insert**/**Update**, and then in the **Data Field Values** dialog box, click **Add**.
8. In the **Add Data Value** dialog box, select the **Record type** and **Field**, and then click **OK**.
9. Click **OK** again to insert the data.

   Tip

   Use the **Default Text** box to define what text is displayed if the record does not have data for the field.

10. Click **Save** or **Save and Close**.
11. If necessary, click **OK** to close the **Set Personal Options** dialog box.

    Notes

    - To change a shared template to a personal one or a personal template to a shared one, on the template form, on the **Actions** menu, click **Revert to Personal Template** or click **Make Template Available to Organization**.
    - If you use an e-mail template as a signature in addition to another template, insert the signature template first, otherwise, the Subject line will be overwritten.
    - If you need to back up your templates, or export them for use in a different implementation of Microsoft Dynamics CRM, you can export them as part of exporting customizations. More information: Export a solution

Related Topics

Work with E-mail Templates 187
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Managing E-mail Activities 184
Sending and Receiving E-mail in Microsoft Dynamics CRM for Outlook 185
Requesting User Interface Changes 220

Set how your e-mail is tracked

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

You can set which type of e-mail messages are tracked as activities in Microsoft Dynamics CRM. The tab is available only in the Web application.

1. Click the **File** tab, and then click **Options**.
2. In the **Set Personal Options** dialog box, on the **E-mail** tab, you can choose one of the following options:
   - **All e-mail messages**

     Select this option if you want all of your e-mail messages to be saved as activities in Microsoft Dynamics CRM.
   - **E-mail messages that contain a Microsoft Dynamics CRM tracking token**

     Select this option if you want only the replies to the e-mail messages that are already tracked in Microsoft Dynamics CRM to be saved as e-mail activities.
3. To save your changes and close the dialog box, click **OK**.

Important
After you save your e-mail message as a Microsoft Dynamics CRM e-mail activity, the saved message can be accessed by anyone who has access to your activities in Microsoft Dynamics CRM.

Related Topics

Manage Activities 23

Set address book options in Microsoft Dynamics CRM for Outlook

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

You can link e-mail messages to contacts and other Microsoft Dynamics CRM record types based on the names and e-mail addresses that are in your Outlook address book.

When you send or receive an e-mail message, the names and e-mail addresses in the From and recipient fields are compared to the names and e-mail addresses in the Microsoft Dynamics CRM record types that you select. If there's a match, the e-mail messages are included as an activity for the records.

1. Start Outlook. (Microsoft Dynamics CRM for Outlook must be installed.)
2. If you have Outlook 2007 installed, on the **CRM** menu, click **Options**.

   - OR -

   If you have Outlook 2010 installed, click **File**. Click the **CRM** tab, and then click **Options**.
3. In the **Set Personal Options** dialog box, click the **Address Book** tab.

   This tab is not available in the Web application.
4. For **Contacts**, choose whether names and e-mail addresses from the address book are compared to some or all of your Microsoft Dynamics CRM contacts.

   - **Match only against contacts synchronized to Microsoft Dynamics CRM**

     This option is selected by default. If you want to link e-mail messages to the Microsoft Dynamics CRM contact records that you have chosen to synchronize and also match a name or e-mail address in your address book, leave this option selected. More information: Choose the types of Microsoft Dynamics CRM records and other items that synchronize with Outlook
   - **Match all contacts in Microsoft Dynamics CRM**

     Click this option if you want to link e-mail messages to any Microsoft Dynamics CRM contact record that also matches a name or e-mail address in the address book.
5. For **Other record types**, choose whether you want to link e-mail messages to other record types if the names and e-mail addresses in the other record types match those in the address book. Also choose the types of records.

   a. If you do not want to link e-mail messages to other record types:

      - Click **Do not match**.

      - OR -

      If you do want to link e-mail messages to other records types:

      - Click **Match only the items I own**.

        - OR -

- Click **Match all items in Microsoft Dynamics CRM**.

b. In the **Change the record types being synchronized to your Address book** box, click the **Select or change the values for this field** button ... . Add or remove record types, and then click **OK**.

6. To save your changes and close the dialog box, click **OK**.

Note
You can synchronize your address book manually:

- If you have Outlook 2007 installed, on the **CRM** menu, click **Synchronize with CRM**.
- If you have Outlook 2010 installed, click **File**. Click the **CRM** tab, and then click **Synchronize with CRM**.

Related Topics

Set Personal Options 201
Doing CRM Work in Outlook 459
Synchronizing Information 484

Set local data synchronization options in Microsoft Dynamics CRM for Outlook

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

If your organization allows it, you can select how frequently information is automatically updated between Microsoft Dynamics CRM and Outlook.

When information is updated more frequently, you can go offline faster because there is less information to update during the synchronization process.

1. Start Outlook. (Microsoft Dynamics CRM for Outlook must be installed.)
2. If you have Outlook 2007 installed, on the **CRM** menu, click **Options**.

   - OR -

   If you have Outlook 2010 installed, click **File**. Click the **CRM** tab, and then click **Options**.
3. In the **Set Personal Options** dialog box, click the **Local Data** tab.

   This tab is not available in the Web application.
4. To change the interval that data is synchronized, select the **Update local data every** check box, and then enter a number between 1 and 60.

By default, the Outlook local data is synchronized with the Microsoft Dynamics CRM address book every 15 minutes. Your administrator sets the minimum time allowed between synchronization.

5. To save your changes and close the dialog box, click **OK**.

Note
You can synchronize information with Microsoft Dynamics CRM at any time.

- If you have Outlook 2007 installed, on the **CRM** menu, click **Synchronize with CRM**.
- If you have Outlook 2010 installed, click **File**. Click the **CRM** tab, and then click **Synchronize with CRM**.

Related Topics

Set Personal Options....201
Doing CRM Work in Outlook....459
Synchronizing Information....484

Set privacy options

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

You can specify whether errors you encounter in Microsoft Dynamics CRM are sent to Microsoft. This data is used to improve the quality of Microsoft Dynamics CRM.

1. Click the **File** tab, and then click **Options**.

   - OR -

   In Outlook, on the **CRM** menu, click **Options**.

2. Click the **Privacy** tab, and select when to send an error report to Microsoft Dynamics CRM. For more information about the program, click the View Privacy Statement link.
3. To save your changes and close the dialog box, click **OK**.

Important
In the above options, if you chose to never send an error report, but continue to receive notification of script errors, disable script debugging in Microsoft Internet Explorer. For instructions about how to do this, see the Microsoft Internet Explorer Help.

Related Topics

Set Personal Options....201

Set Activities options

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

You can set the default view for your Workplace calendar, and set your working hours. This tab is not available in Microsoft Dynamics CRM for Outlook.

1. Click the **File** tab, and then click **Options**.
2. In the **Set Personal Options** dialog box, on the **Activities** tab, you can make changes to the following options:
   - **Default Calendar**

     Select whether you want your default calendar view to be by day, week, or month.
   - **Start Time** and **End Time**

     Select the time you start and end your work day. This affects scheduling and your calendars.
3. To save your changes and close the dialog box, click **OK**.

Related Topics

Set Personal Options 201

Manage Activities 23

Set regional options for yourself

You can control how Microsoft Dynamics CRM displays numbers, currencies, times, and dates in your account.

Can I do this task?

This task requires permissions that are found in all default security roles. This task can be performed only in the Web application. More information: Common Task Permissions

1. Click the **File** tab, and then click **Options**.

   - OR -

   In Outlook, on the **CRM** menu, click **Options**.
2. Click the **Formats** tab.
3. From the **Current Format** list, select the name of the language and country or region that corresponds to the format you want to use.
4. To save your changes and close the dialog box, click **OK**.

Tip
In addition to selecting a predefined combination of language and country or region, you can also personalize number, currency, time, and date formats. To personalize these formats, click **Customize**.

Related Topics

Set Personal Options 201
Requesting User Interface Changes 220

Set local data synchronization options in Microsoft Dynamics CRM for Outlook

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

If your organization allows it, you can select how frequently information is automatically updated between Microsoft Dynamics CRM and Outlook.

When information is updated more frequently, you can go offline faster because there is less information to update during the synchronization process.

1. Start Outlook. (Microsoft Dynamics CRM for Outlook must be installed.)
2. If you have Outlook 2007 installed, on the **CRM** menu, click **Options**.

   - OR -

   If you have Outlook 2010 installed, click **File**. Click the **CRM** tab, and then click **Options**.
3. In the **Set Personal Options** dialog box, click the **Local Data** tab.

   This tab is not available in the Web application.
4. To change the interval that data is synchronized, select the **Update local data every** check box, and then enter a number between 1 and 60.

   By default, the Outlook local data is synchronized with the Microsoft Dynamics CRM address book every 15 minutes. Your administrator sets the minimum time allowed between synchronization.
5. To save your changes and close the dialog box, click **OK**.

Note
You can synchronize information with Microsoft Dynamics CRM at any time.

- If you have Outlook 2007 installed, on the **CRM** menu, click **Synchronize with CRM**.

- If you have Outlook 2010 installed, click **File**. Click the **CRM** tab, and then click **Synchronize with CRM**.

Related Topics

Set Personal Options 201
Doing CRM Work in Outlook 459
Synchronizing Information 484

Set language options

You can control the display language for the user interface and Help in Microsoft Dynamics CRM.

Can I do this task?

This task requires permissions that are found in all default security roles. This task can be performed only in the Web application. More information: Common Task Permissions

1. Click the **File** tab, and then click **Options**.

   - OR -

   In Outlook 2007, on the **CRM** menu, click **Options**.

   - OR -

   In Outlook 2010, click the **File** tab. Click **CRM**, and then click **Options**.
2. Click the **Languages** tab.
3. From the **User Interface Language** list, select the language that you want Microsoft Dynamics CRM to use for display.
4. From the **Help Language** list, select the language for Microsoft Dynamics CRM Help.
5. To save your changes and close the dialog box, click **OK**.

   Important
   If you are running Microsoft Dynamics CRM for Microsoft Office Outlook, before you can enable additional languages, you must download one or more *Language Packs* http://go.microsoft.com/fwlink/?LinkId=200478 on the same computer.

Related Topics

Set Personal Options 201
Requesting User Interface Changes 220

Requesting User Interface Changes

Because customizations affect all users, only a user with the System Administrator or System Customizer security role, or equivalent permissions, can make customizations. If something would make it easier to do your job, let your manager or system administrator know.

Common customizations include:

- Change your permissions, if needed to do your job.
- Change the choices and the default value for a list. This includes the industry values in accounts and leads. It also includes the reasons for closing an activity, case, or lead.
- Change the criteria that determines if there are potential duplicate records.
- Change the names of record types or the text labels used in forms and views to reflect your organization's terminology.
- Link new record types and relationships with other record types to capture information you need.
- Add new fields on forms to track information that does not fit in existing fields.
- Hide features that you do not use.
- Modify reports.
- Change the columns that are displayed in views, the order the columns are displayed, and how the views are sorted. For each record type, there are several types of views that can be changed.

Using Mobile Express

Mobile solutions for Microsoft Dynamics CRM Online enable companies to enhance the performance of their business by giving people access to CRM data and information wherever and whenever they need it, while keeping costs under control. With a choice of mobile solutions, Microsoft Dynamics CRM Online gives companies the flexibility to achieve rapid return on investment today and innovate for tomorrow.

On This Page

Requirements to access Mobile Express 221

Supported browsers and devices 221

Partner Solutions 223

Mobile Express for Microsoft Dynamics CRM gives users access to Microsoft Dynamics CRM Online data through a Web browser on a mobile device. Mobile Express is an easy-to-use extension of Microsoft Dynamics CRM Online that allows the ability to view, create, and modify CRM data on any Internet-capable mobile device.

Requirements to access Mobile Express

You must have an Internet or intranet connection to use Mobile Express; you can access it in either of two ways:

- To access Microsoft Dynamics CRM from your mobile Web browser, go to the URL for Mobile Express. Typically this is https://<CRM_server>/m where <CRM_server> is the name of the server you use to access CRM. Your system administrator will have the appropriate URL.
- To access Microsoft Dynamics CRM Online from your mobile Web browser, go to http://crm.dynamics.com and log in.

Supported browsers and devices

Mobile Express for Microsoft Dynamics CRM is available through many mobile devices, operating systems, and browsers. If your device's browser supports HTML 4.0 (or newer) and JavaScript, you have met the basic requirements to use Mobile Express. You do not need to install an application on your mobile device in order to use Mobile Express. You can access its full functionality by simply logging in through your mobile browser.

As of March, 2011, Mobile Express supports the devices in the following list, among many others. Because we strive to support the broadest possible audience of mobile users, this list might grow. So, even if you do not see your device, you should try to access Mobile Express.

Supported devices, listed by operating system

Device	Operating System	Browser
All	Windows Phone 7	Internet Explorer

Device	Operating System	Browser
HTC HD2	Windows Mobile 6.5	Internet Explorer, Opera
HTC Fuze	Windows Mobile 6.5	Internet Explorer
Palm Treo	Windows Mobile 6.1	Internet Explorer, Opera

Device	Operating System	Browser
Palm Pre	Palm WebOS	Palm

Device	Operating System	Browser
Nokia N97 mini, Nokia E71	Nokia S60	Nokia
Nokia	Nokia S40	Nokia

Device	Operating System	Browser
Various*	Android	Various*

*Almost all recently manufactured Android devices support HTML 4.0 and newer, as well as JavaScript.

Device	Operating System	Browser
iPhone 3.0	Apple	Safari
iPhone 4.0	Apple	Safari
iPad	Apple	Safari

Device	Operating System	Browser
Storm	Blackberry	Blackberry
Storm 2	Blackberry	Blackberry
Curve	Blackberry	Blackberry, Opera

Partner Solutions

We have partners that offer solutions to enhance and extend the features and capabilities of Mobile Express. Visit their Web sites for **more information:**

CWR Mobility http://www.cwrmobility.com/

TenDigits http://accessdynamicscrm.com/

Yes. You can use a mobile Web browser in your Web-enabled mobile phone to connect to your Microsoft Dynamics CRM system. For more information, see Getting started with CRM mobility and *Using Mobile Express ./help/ug_mobile_use.htm*.

Find information in articles in the knowledge base

The knowledge base is a collection of articles that your organization creates. They can include procedures, answers to common questions, product sheets, problem solutions, or anything else your organization wants to share.

You can search for an article by keyword, title, article, number, subject, or use a full-text search. For more information about searching the knowledge base, click **Help on This Page**.

- To search for, and then view, an article, on the Navigation Pane, under **My Work**, click **Articles**.

  Tip
  If an article is outdated, incomplete, or incorrect, you can add comments.

Work with Published Articles

You can search or browse the Articles library for published articles. You can also view articles, print articles, or e-mail them to customers. More information: *Create and Publish Articles* (on page 453)

Find an article in the Knowledge Base

Can I do this task?

This task requires permissions that are found in all default service security roles. More information about specific permissions and performing this task while offline: Service Permissions

Search results do not include unpublished articles.

1. In the Navigation Pane, click **Service**, and then click **Articles**.
2. In the Search list, in the list, select a type of search.
   - **General**

     This search looks through all of the words in all published articles to find articles that match your search criteria.

- **Keyword Search**

  This search compares your search criteria with alternate terminology assigned to an article to find articles. For example, an article about bicycles might use keywords such as "bike,""cycle," or "trike."

- **Title Search**

  This search look at the title of all published articles to find articles that match your search criteria.

- **Article Number Search**

  This search looks for the number that is assigned to the article when it is published. If you know the article number, this is the fastest way to find a specific article.

3. In the **Search for** box, type a word, phrase, keyword, or article number.
4. To narrow your search by subject, locate and select a subject. You can click the **Lookup** button to search for a subject. If you want to search the entire database, do not select a subject.
5. In the **Options** list, select **Exact Text** to search for the exact words that you enter in the **Search for** box, or select **Use Like Words** to search for similar words. For example, if you enter "run," the search would include "running" and "runs."
6. Click **Search** to perform the search.

   The articles that match your criteria are displayed in the right pane. Double-click an article to open it.

   Important
   When you add a new article or comment, you cannot search for it until the catalog index is updated. Microsoft Dynamics CRM updates the catalog index automatically every 15 minutes.

   Notes
   - If you want to view the article queues, in the **Search** list, select **Articles**, and then select the queue.
   - If you want to browse the subject tree for articles, in the **Search** list, select **Subject Browse**. When you expand the subject tree, the related articles appear in the right pane.
   - You can also view articles in the **Workplace** area, under **My Work**.

Related Topics

Work with Published Articles 223
Create and Publish Articles 453

Add or delete a comment

Can I do this task?

This task requires permissions that are found in all default service security roles. More information about specific permissions and performing this task while offline: Service Permissions

1. In the Navigation Pane, click **Service**, and then click **Articles**.

2. In the **Articles** drop-down list, click the **Draft Articles**, **Unapproved Articles**, or **Published Articles** view to display the list of articles.
3. Double-click the article you want.
4. Under **Information**, click **Add Article Comment**.
5. Add a comment.
   a. On the Actions toolbar, click **New Article Comment**.
   b. In the **Comment on This Article** dialog box, in the **Comment Title** box, type a title for your comment.
   c. In the blank box, type your comment, and then click **OK**.
6. Delete a comment.
   a. In the list of comments, select the comment you want to delete.
   b. On the Actions toolbar, click the **Delete** button, and then click **OK**.
7. Click **Save** or **Save and Close**.

Related Topics

Work with Published Articles 223
Create and Publish Articles 453

Attach an article to an e-mail message

Can I do this task?

This task requires permissions that are found in all default service security roles. More information about specific permissions and performing this task while offline: Service Permissions

You can attach or insert a published article to an e-mail message that is created in the Web application. This procedure does not work for Microsoft Dynamics CRM for Outlook.

1. In the Web application, create an e-mail message.
2. In the **E-mail** form, in the **Include** group, click **Insert Article**.
3. In the list of articles, select the title of the article that you want to send.

   To preview the article, click **View Article**.
4. Click **OK**.

   The full text of the article is inserted into the e-mail.
5. Type any additional text, or edit the article.
6. Click **Send**.
7. Click **Save** or **Save and Close**.

Related Topics

Work with Published Articles 223
Create and Publish Articles 453
Work with E-mail Activities 187

Creating and Using Workflows

By using workflows to automate your business processes, you can:

- Ensure consistency in how records are handled.
- Ensure consistency in the information that is stored in your organization's Microsoft Dynamics CRM database.
- Allow people in your organization to focus on growing your business instead of performing repetitive tasks.

If you have the System Administrator or System Customizer security role, you have the necessary permissions to create workflows that can affect records throughout your organization's implementation of Microsoft Dynamics CRM. However, even if you do not have one of these security roles, you can still create workflows that affect the records that you own.

Several ways to create workflows

There are several ways that you can add workflows to your implementation of Microsoft Dynamics CRM:

- Create workflows by using the Microsoft Dynamics CRM Web application.
- Create custom workflows and custom workflow actions by using the information that is available in the *Microsoft Dynamics CRM Software Development Kit*. For more information, refer to the *Microsoft Dynamics CRM Software Development Kit* http://go.microsoft.com/fwlink/?LinkId=208672.
- Purchase custom workflows or custom workflow actions from third-party vendors who develop solutions that are compatible with Microsoft Dynamics CRM. For more information about how to integrate a third-party workflow or workflow action, contact the vendor.

Creating workflows by using the Web application

There are four basic steps to creating a workflow by using the Web application:

1. Create an empty workflow or use a workflow template to create the workflow.
2. Specify the workflow properties.
3. Add conditions, workflow actions, and other elements that define your workflow logic.
4. Activate the workflow.

More information:

- *Work with Workflows* (on page 229)
- Workflow Structure

Using workflows

You use workflows by either applying an on-demand workflow yourself or by specifying when Microsoft Dynamics CRM should start an automatic workflow for you.

More information: *Start an On-Demand Workflow* (on page 50)

Workflow Lifecycle

There are three basic phases to a workflow lifecycle: creating workflows. publishing workflows, and monitoring workflow jobs.

Lesson 1: Workflow structure

There are two types of processes in Microsoft Dynamics CRM: workflows and dialogs. Both process types share some process properties and use some of the same process logic. Both types of processes are made up of process properties and process logic. You start creating workflows dialogs in the same way. However, the process properties you select define whether the process will be a dialog or a workflow. Once you define the process as a workflow, the remaining properties and the process logic that is available will be specific to workflows.

Process properties

At a minimum, each workflow requires the following properties:

- **Process name**. A descriptive name makes it easier to find and run the right workflow.
- **Entity**. Although a workflow can take action on more than one entity, it is still associated with a single primary entity.
- **Type**. You can select whether the process you create is a new blank process or a process template. A process template is a type of process that serves exclusively as the basis for creating other process. Process templates cannot start workflow jobs.
- **Category**. Workflows and dialogs are both processes, but there are differences. You must select **Workflow** as the category in order to use the properties and logic that is specific to workflows.
- **Scope**. A workflow's scope determines the records that the workflow can take action on. The scope is limited by the permissions that the workflow's owner has, as well as by the access level the owner selects for the scope when they create the workflow.

  Scope options are:

  - **Organization**
  - **Parent:Child Business Units**
  - **Business Unit**

- **User**

- **How automatic processes are started**. You can specify what events in your Microsoft Dynamics CRM implementation will cause the workflow to take action, such as the creation of a new lead record or a specific change to a case record.

  Available events are:

  - When a record is created.
  - When the status of a record changes, such as when it is closed or deactivated.
  - When a record is assigned to someone else.
  - When a specified field in the record changes.
  - When a record is deleted.

- **Availability**. In addition to workflows that run automatically when certain events occur, you make the workflow available as an on-demand process, a child process, or both:

  - An on-demand process runs only when a user chooses to apply it to records from a toolbar or menu in Microsoft Dynamics CRM.
  - A child process runs only when started by another process. It is contained within a parent process and cannot be run on its own.

Process logic

The process logic you add to your workflow determines the specific actions that the workflow will take on records.

Process logic for a workflow includes the following elements:

- **Stages**. Stages are elements of process logic that group steps. Process rules determine the required activities for a workflow and the order in which those activities must be performed. By adding stages to your process logic, you can group the steps in your workflow. Stages make the process logic of the workflow easier to read, and explain. However, stages do not affect the logic or behavior of workflows.

  A system job is a process that Microsoft Dynamics CRM performs independently or in the background. Stage descriptions appear as headings in system job forms, which display the progress of a workflow job, a type of system job. Stage descriptions can also appear in reports.

  You can use stages to define business processes that your organization uses. For example, one workflow could use stages to describe the opportunity management process for your sales team, while another workflow could define the case resolution process for your customer service representatives.

- **Steps**. A step is an element of process logic that defines a unit of business logic within a workflow. Steps can include conditions, actions, other steps, or a combination of these elements. There is no limit to how deeply you can nest workflow steps.

  You can add the following types of steps to workflows:

  - **Check Condition**. Defines a specific situation and any actions that should be taken if that situation occurs. A logical "if-then" statement in a workflow.
  - **Conditional Branch**. Defines an alternative condition and action or additional steps, in cases when the criteria in a check condition element are not met. A logical "else-if-then" statement in a workflow.

- **Default Action**. Defines an alternative action in all cases that do not match the criteria defined in check conditions or parallel wait branch elements. A logical "else" statement in a workflow.
- **Wait Condition**. Enables a workflow to pause itself until the criteria defined by the condition have been met. The workflow starts again automatically when the criteria in the wait condition have been met.
- **Parallel Wait Branch**. Defines an alternative wait condition with a corresponding set of additional steps that are performed only when the initial criterion is met. You can use parallel wait branches to create timeouts in your process logic. They help prevent the workflow from waiting indefinitely until the criteria defined in a wait condition have been met.
- **Custom step**. Provides extensions to the logical elements available by default in Microsoft Dynamics CRM. Steps can include conditions, actions, other steps, or a combination of these elements. Custom workflow steps can be developed by using the information in the *Microsoft Dynamics CRM SDK* http://go.microsoft.com/fwlink/?LinkId=104332.

- **Actions**. Actions are elements of process logic that specify the actions to be performed by workflow jobs when conditions defined in the workflow have been met. By adding actions to workflow steps, you define the specific actions you want the workflow to perform.

  You can add the following actions to workflows:

  - Create a record
  - Update a record
  - Assign a record
  - Send an e-mail notification
  - Start a child workflow
  - Change the status of a record
  - Stop the current workflow
  - Perform a custom workflow action

Work with Workflows

By creating workflows, you can create the business logic necessary to automate some or all of your business processes.

Create or edit a workflow

Can I do this task?

This task requires the System Administrator or System Customizer security role or equivalent permissions. Customization tasks can be performed only while you are online. More information: *Customization Permissions* (on page 490)

1. In the Navigation Pane, click **Settings**, and then under **Process Center**, click **Processes**.

2. On the Actions toolbar, click **New**.
3. In the dialog box, set required properties for the workflow.
   a. In the **Workflow name** box, type the name that you want to use for this workflow.
   b. From the **Entity** list, select the primary entity that you want to use with this workflow.
   c. In the **Type** area, select whether you want to create a completely new workflow or whether you want to use a workflow template.
   d. If you want to vew details about the workflow template, select the workflow template and click **Properties**.
   e. Click **OK**.
4. In the area in the top half of the Workflow form, set additional properties for the workflow.
   a. If you plan to publish this workflow to automate your business processes, from the **Publish As** list, select **Workflow**.

      - OR -

      If you plan to publish this workflow as a workflow template, from the **PUBLISH AS** list, select **WORKFLOW TEMPLATE**.
   b. Under **Available to Run**, select how you want to make the workflow available to other users in your organization:
      - **On demand**. If you want to make the workflow available as an on-demand workflow, select this check box.
      - **As a child workflow**. If you want to make the workflow available as a child workflow, select this check box.
   c. If you are creating an automatic workflow, under **Options for Automatic Workflows**, set options unique to workflows that run automatically:
      - **Scope**. Select the access level that matches the workflow scope that you want to set for this workflow.

        Note: The items available to you in this list depend on the privileges that have been assigned to your security role for the workflow's primary entity.
      - **Start when**. Select the check boxes that correspond to the events in your implementation of Microsoft Dynamics CRM that you want to start the workflow.

        Note: If you select the **Record attributes change** check box, you must click **Select** and specify the attributes of the primary entity that you want the workflow to monitor for changes.
5. Add stages to your workflow logic.

   In the lower half of the **Workflow** form, you can add workflow stages to your workflow logic.
   a. Select the line in your workflow logic where you want to add the workflow stage.
   b. On the Workflow Logic toolbar, click **Add Step** and select **Stage**.
   c. Click **OK**.

d. Click **Type a stage description here** and replace the default text with a description of what your workflow stage includes.

Note: If you want to add more stages to your workflow, first click the area to the left of the existing workflow stage. Next, click the **Insert** menu and select whether you want to add the stage above or below the one that you selected. Click **Add Step**, select **Stage**, and then click **OK**.

6. Add steps to your workflow logic.

In the lower half of the **Workflow** form, you can add workflow steps to your workflow logic.

Tip: You can repeat these steps to add whatever steps you want to include in your workflow logic.

d. Select the line in your workflow logic where you want to add the workflow step.

a. On the Workflow Logic toolbar, click **Add Step** and select one of the following items:

- **Check Condition**. Adds a check condition to the workflow. You can add a check condition at any level in your workflow logic.

  After you have added a check condition to your workflow, you can add one or more conditional branches and a default action to the check condition:

  - **Conditional Branch**. Adds a conditional branch to the workflow. To add a conditional branch, you must select the **If** line in a check condition or the **Otherwise, if** line in another conditional branch.

  Note that more than six levels of conditional branching are not displayed.

  - **Default Action**. Adds a default action to the workflow. You can include only one default action associated with a check condition. To add a default action, you must select the **If** line in a check condition or the **Otherwise, if** line in a conditional branch.

- **Wait Condition**. Adds a wait condition to the workflow. You can add a wait condition at any level in your workflow logic.

  After you have added a wait condition to your workflow, you can add one or more parallel wait branches to the wait condition:

  - **Parallel Wait Branch**. Adds a parallel wait branch to the workflow. To add a parallel wait branch, you must select the **Wait until** line in a wait condition or the **Otherwise, wait until** line in another parallel wait branch.

b. Click **condition**.

c. In the **Specify Condition** dialog box, select the condition for the step:

Tip: After you specify one condition, move your cursor over the area to the right of the condition you just specified. New fields appear, in which you can specify additional details about the condition.

1. In the first list, select a primary entity or related entity.
2. In the second list, select a field in the entity you selected in the previous step.
3. In the third list, select the logical operator that best fits the condition you want to specify, such as **Contains** or **Equals**.
4. In the last lists or boxes, enter the values that you want to use as the criteria for your condition.

5. Click **Save and Close**.

Tip: You can specify multiple conditions for a single process step. After you select an entity from the first column, a second line appears, where you can specify another condition. The process considers the conditions to have been met only when an event matches all of the criteria.

d. On the **Workflow** form, click **Type a step description here** and replace the default text with a description of what your workflow step includes.

7. Add actions to your workflow logic.

In the Workflow Logic area in the lower half of the **Workflow** form, you can add workflow actions to your workflow logic.

Tip: You can repeat these steps to add whatever actions you want to include in your workflow logic.

a. Select the line in your workflow logic where you want to add an action.

b. On the Workflow Logic toolbar, click **Add Step** and select one of the following items:

- **Create Record**. Creates a new record. From the **Create** list, select the entity for which you want to create individual records.
- **Update Record**. Updates a record. From the **Update** list, select the record that you want to update.
- **Assign Record**. Assigns a record from one user to another user. From the **Assign** list, select the record that you want to reassign, and then click the **Lookup** button and select the user you want to assign the record to.
- **Send E-mail**. Sends an e-mail notification. From the **Send e-mail** list, select whether you want to create a new e-mail message or use an E-mail Template.
- **Start Child Workflow**. Starts a child workflow. From the **Start child workflow** list, select the primary entity of the child workflow you want to use, and then click the **Lookup** button and select the child workflow.
- **Change Status**. Changes the status of a record. From the first **Change status** list, select the record that you want to change the status of, and then select the status from the second list.
- **Stop Workflow**. Stops the current workflow. From the **Stop workflow with status of** list, select the status that you want to set for the stopped workflow.

c. If a **Set Properties** button appears next to the new action you added, click **Set Properties** and specify details about the entity that this step in your workflow is taking action on.

d. Click **Type a step description here** and replace the default text with a description of what your workflow step includes.

8. Click **Save** or **Save and Close**.

Notes

- If you use a wait condition to wait for a timeout, you cannot change the timeout condition (you can change individual details for the timeout, but you cannot change the timeout to another type of condition). If you need to change the conditions, delete the timeout and add a new wait condition.

- If you need to back up workflows, or export them for use in a different implementation of Microsoft Dynamics CRM, you can export them as part of exporting customizations. More information: Export Customizations and Configurations

Related Topics

Work with Workflows 229
Creating and Using Workflows 223
Workflow Lifecycle 227

Add or change dynamic values in a workflow

Can I do this task?

This task requires permissions that are found in all default security roles. Customization tasks can be performed only while you are online. More information: *Customization Permissions* (on page 490)

You can use dynamic values in the entities or records that you use in a workflow, as well as in the conditions in your workflow logic.

1. In the Navigation Pane, click **Settings**, and then under **Process Center**, click **Processes**.
2. Open the workflow that includes fields where you want to use dynamic values.
3. If you want to add dynamic values to fields in a workflow condition, open the condition that includes the fields.

   - OR -

   If you want to add dynamic values to fields in an entity or record that a workflow action uses, click **Set Properties** for that entity or record.
4. If the **Form Assistant** pane is not displayed, click the **Expand** button .
5. Click the field where you want to insert a dynamic value.
6. Under **Dynamic Values** in the **Form Assistant** pane, from the **Operator** list, select a logical operator.
7. From the first list under **Look for**, select the entity or record that includes the fields you want to insert as dynamic values.
8. From the second list under **Look for**, select the specific field you want to insert, and then click **Add**.
9. If you want Microsoft Dynamics CRM to insert alternative values in cases when the field you specified in steps 4 through 6 is empty, repeat these steps to add additional fields, and then use the **Move Up** and **Move Down** buttons to arrange them in the order that you want Microsoft Dynamics CRM to evaluate them.
10. If you want Microsoft Dynamics CRM to insert static text when none of the fields you have specified contain any data, in the **Default text** box, type the text that you want Microsoft Dynamics CRM to display instead of a dynamic value.

11. Click **OK**.

    The dynamic values appear as yellow boxes in the fields where you inserted them.

12. In the form for the entity, record, or conditions used in your workflow, click **Save and Close**.

13. In the **Workflow** form, click **Save** or **Save and Close**.

    Note
    You cannot edit dynamic values that you have already inserted in a field. To change a dynamic value, you must remove the old value and add a new one. Select the yellow box in the field for the value you want to change, press the DELETE key on your keyboard, and then add the dynamic value you want to use in its place.

Related Topics

Work with Workflows 229
Creating and Using Workflows 223
Workflow Lifecycle 227

Publish or unpublish a workflow

Can I do this task?

This task requires permissions that are found in all default security roles. Customization tasks can be performed only while you are online. More information: *Customization Permissions* (on page 490)

Activating a workflow makes it available to use as an automatic workflow, on-demand workflow, or child workflow. Unactivated workflows that are in a draft state cannot be used.

1. In the Navigation Pane, click **Settings**, and then under **Process Center**, click **Processes**.
2. Select the workflow that you want to activate or deactivate.
3. To activate a workflow, on the Actions toolbar, click **Activate**.

   - OR -

   To deactivate a workflow, on the Actions toolbar, click **Deactivate**.

4. In the confirmation message, click **OK**.

   Note
   You cannot deactivate workflows that have active workflow jobs. Before you deactivate a workflow, check for any active workflow jobs and cancel them. More information: Work with System Jobs

Related Topics

Work with Workflows 229
Creating and Using Workflows 223
Workflow Lifecycle 227

Start an On-Demand Workflow

If you or your organization have created on-demand workflows, you can apply these workflows to records that appear in a list.

Concepts:

- *Creating and Using Workflows* (on page 223)
- Monitoring and Managing Workflows

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

1. Open the list of records that contains the record to which you want to apply a workflow, such as leads or cases.
2. Select the record or records to which you want to apply a workflow.
3. In the **Process** group, click **Run Workflow**.
4. In the **Look Up Record** dialog box, select the workflow that you want to run, and then click **OK**.

   In the confirmation message, click **OK**.

Creating and Using Dialogs

Dialogs are interactive scripts. Create them to guide users step-by-step through a defined business process.

Dialogs provide:

- Consistent customer interactions and interactive user tasks.
- Consistent information entry into your organization's database.
- A way for people in your organization to focus on growing your business, instead of performing repetitive tasks.

If you have the System Administrator or System Customizer security role, you have the necessary permissions to create dialogs that can be started your organization. If you do not have one of these security roles, you can create dialogs that can be started for the records that you own.

Understanding dialogs structure

Dialogs are a combination of:

- Process properties
- Input arguments
- Variables
- Prompt and response steps
- Workflow logic

process properties

The basic details of a process, whether a workflow or dialog, including its name and the primary entity that it acts on (such as Lead or Case).

input argument

A user-defined value that is used to pass data from a parent dialog into a child dialog. An input argument can be included only in a child dialog.

variables

Data that you can store in a dialog and pass in as values in steps and actions.

prompt and response

A step in a dialog process that prompts customers to make selections from a set of values or to enter values in fields. The customer's selection is their response. A prompt and response step may also simply provide instructions to a user that require no response in the user interface.

workflow logic

All of the conditions, actions, and other logical elements that define when and how a particular workflow takes action on Microsoft Dynamics CRM records.

Work with dialogs

You can use dialogs to create processes that combine interactive scripts with workflow logic steps.

Create a dialog

Add or change dynamic values in a dialog

Activate or deactivate a dialog

Assign a process to another user

Assign a process to yourself

Share a process with other users

Start a dialog

What else can I do? More tasks...

Create a dialog

Can I do this task?

This task requires the System Administrator or System Customizer security role or equivalent permissions. Customization tasks can be performed only while you are online. More information: *Customization Permissions* (on page 490)

1. In the Navigation Pane, click **Settings**, and then under **Process Center**, click **Processes**.
2. On the Actions toolbar, click **New**.
3. In the Create Process dialog box, set required properties for the dialog.
   a. In the **Process name** box, type the name that you want to use for this dialog.
   b. From the **Entity** list, select the primary entity that you want to use with this dialog.
   c. From the **Category** list, select **Dialog**.
   d. In the **Type** area, select whether you want to create a completely new process or whether you want to use a process template.

      If you want to view details about a process template, select the process template, and then click **Properties**.
   e. Click **OK**.
4. In the Process Properties area, set additional properties for the dialog.
   a. If you plan to publish this dialog to use for your business processes, from the **Activate As** list, select **Process**.

      - OR -

      If you plan to publish this dialog as a process template, from the **Activate As** list, select **Process template**.
   b. Under **Available to Run**, select how you want to make the dialog available to other users in your organization:
      - **As an on-demand process**. If you want to be able to start the dialog manually for a specified entity as an on-demand process, select this check box.
      - **As a child process**. If you want use the dialog as a child dialog, which means that it starts only when it is triggered within another dialog, select this check box.
5. Add input arguments to your dialog.

   You can use input arguments to pass data into a dialog that will be used as a child dialog.
   a. In the **Input Arguments** section, click **Add** to open the **Add or Modify Properties** dialog box.

b. In the **Name** field, type a unique name for the input argument. This name is the identifier for the input argument and it should be clear enough to enable you to identify it later when you want to use it in a dialog.

c. From the **Data type** list, select the data type for the input argument:

- **Text** is an alphanumeric value.
- **Integer** is a numeric value.
- **Float** is a floating-point numeric value.

d. In the **Default Value** field, enter a default value for the input argument. The default value must match the data type you selected.

e. To save your changes and close the dialog box, click **OK**.

6. Add variables to your dialog.

You can add variables to store data within a dialog for use later. For example, to insert data in fields for workflow activities that occur within the dialog:

a. In the **Variables** section, click **Add** to open the **Add or Modify Properties** dialog box.

b. In the **Name** box, type a unique name for the variable. This name is the identifier for the variable and it should be clear enough to enable you to identify it later when you want to use it in a dialog.

c. From the **Data type** list, select the data type for the input argument:

- **Text** is an alphanumeric value.
- **Integer** is a numeric value.
- **Float** is a floating-point numeric value.

d. In the **Default Value** box, type a default value for the variable. The value must match the data type you selected.

e. To save your changes and close the dialog box, click **OK**.

Notes

- Variables in dialogs have a global scope and can be accessed for any step in your dialog.
- You can use variables as data slugs in the workflow logic for different action steps in your dialog.
- You can use variables to maintain a running counter for determining a score based on responses in prompt and response steps.
- You can use variables for computational values that can be used in a dialog by using the assign value step.

7. Add stages to your dialog.

In the **Process Logic** area in the lower half of the **Process** form, you can add stages to your dialog.

a. Under **Steps**, click where you want to add the stage.

b. On the Process Logic toolbar, click **Add Step** and select **Stage**.

c. Click **OK**.

d. Click **Type a stage description here** and replace the default text with a description of what your dialog stage includes.

Note: If you add a stage to a dialog, then all steps and pages must be contained within a stage. If necessary, Microsoft Dynamics CRM will organize steps that already exist into a stage when you add a new stage.

8. Add pages to your dialog.

   You must add at least one page to a dialog. Pages contain the prompt and response steps that make up the basic structure of a dialog.

   e. Under **Steps**, click where you want to add the page.

   f. On the Process Logic toolbar, click **Add Step** and select **Page**.

   g. Click **Type a description here** and replace the default text with a description of the page.

9. Add prompt and response steps to your dialog.

   You must add at least one prompt and response step to a page your dialog.

   a. Select the line in your dialog page where you want to add the prompt and response step.

   b. On the Process Logic toolbar, click **Add Step** and select **Prompt and Response**.

   c. Under **Steps**, click **Set Properties**.

   d. In the **Define Prompt and Response** dialog box, in the **Prompt Details** section, type the text the user sees when they use the dialog.

      1. In the **Prompt Text** box, type a question or instructions for the prompt.
      2. In the **Tip Text** box, type an optional tip to help clarify the prompt.

   e. In the **Response Details** section, set the details for the response.

      1. From the **Response Type** list, select a response type.
         - Select **None** to have a prompt that allows no response. A prompt with no response may be an instruction to take some external action, such as calling a contact, before proceeding to the next prompt.
         - Select **Single Line** to provide a response that consists of a single line of text with no more than 255 characters, including spaces.
         - Select **Option Set (radio buttons)** to provide a specified set of responses that are displayed as radio buttons in the dialog.
         - Select **Option Set (picklist)** to provide a specified set of responses that are available from a picklist in the dialog.
         - Select **Multiple Lines of Text (Text Only)** to provide a response that consists of multiple lines of text with no more than 255 characters, including spaces.
      2. From the **Data type** list, select a data type for the response.
         - **Text** is an alphanumeric value.
         - **Integer** is a numeric value.

- **Float** is a floating-point numeric value.

3. If you selected **Single Line** or **Multiple Lines (Text Only)** as the response type, type a default value in the **Default Value** box, and then, next to **Log Response**, select whether or not to log the response so that it can be used in another place in the dialog.
4. If you selected **Option Set (radio buttons)** or **Option Set (picklist)** as the response type, for **Provide Values**, select how you will provide values for the response.
   - **Define Values** enables you to define your own values to the response.
   - **Query CRM Data** enables you to provide values from a record in Microsoft Dynamics CRM.

f. Click **Save and Close**.

g. Click **Type a step description here** and replace the default text with a description of what your dialog step includes.

10. Add steps to your dialog.

    In the **Process Logic** area in the lower half of the **Process** form, you can add a check condition step to your dialog. This step checks the data in the entity where you are running the dialog and performs an assigned action.

    a. Under **Steps**, click where you want to add the check condition step.

    b. On the Process Logic toolbar, click **Add Step**, and then select **Check Condition**. You can add a check condition at any level in your workflow logic.

    After you have added a check condition to your workflow, you can add one or more conditional branches and assign a default action to the check condition:

    - **Conditional Branch**. Adds a conditional branch to the workflow. To add a conditional branch, you must select the **If** line in a check condition or the **Otherwise, if** line in another conditional branch.

    Note that more than six levels of conditional branching are not displayed.

    - **Default Action**. Adds a default action to the **If** dialog box. You can include only one default action associated with a check condition. To add a default action, you must select the **If** line in a check condition or the **Otherwise, if** line in a conditional branch.

    c. Click **condition**.

    d. In the **Specify Condition** dialog box, select the condition for the step:

    Tip: After you specify one condition, move your cursor over the area to the right of the condition you just specified. New fields appear, in which you can specify additional details about the condition.

    1. In the first list, select a primary entity or related entity.
    2. In the second list, select a field in the entity you selected in the previous step.
    3. In the third list, select the logical operator that best fits the condition you want to specify, such as **Contains** or **Equals**.
    4. In the last lists or boxes, enter the values that you want to use as the criteria for your condition.
    5. Click **Save and Close**.

Tip: You can specify multiple conditions for a single process step. After you select an entity from the first column, a second line appears, where you can specify another condition. The process considers the conditions to have been met only when an event matches all of the criteria.

e. In the **Process Logic** area, click **Type a step description here** and replace the default text with a description of what your check condition step includes.

11. Add actions to your dialog.

In the **Process Logic** area in the lower half of the **Process** form, you can add actions to your dialog.

a. Under **Steps**, click where you want to add an action.

b. On the Process Logic toolbar, click **Add Step**, and then select one of the following items:

- **Query CRM Data**. Queries a Microsoft Dynamics CRM record to return specified data.
- **Assign Value**. Assigns a specified value to a variable or input argument that you have set up for the dialog.
- **Create Record**. Creates a new record. From the **Create** list, select the entity for which you want to create individual records.
- **Update Record**. Updates a record. From the **Update** list, select the record that you want to update.
- **Assign Record**. Assigns a record from one user to another user. From the **Assign** list, select the record that you want to reassign, and then click the **Lookup** button and select the user you want to assign the record to.
- **Send E-mail**. Sends an e-mail notification. From the **Send e-mail** list, select whether you want to create a new e-mail message or use an e-mail template.
- **Start Child Workflow**. Starts a child workflow. From the **Start child workflow** list, select the primary entity of the child workflow you want to use, and then click the **Lookup** button and select the child workflow.
- **Link Child Dialog**. Starts a child dialog. From the **Link Child Dialog** list, select the primary entity of the child dialog you want to use, and then click the **Lookup** button and select the child dialog.

  Note: A link to a child dialog is the last action or step you should have in a dialog. When the dialog runs, the link to a child dialog takes you away from the parent dialog and you can't return to it. Any steps that follow the link to a child dialog will be ignored.
- **Change Status**. Changes the status of a record. From the first **Change status** list. Select the record that you want to change the status of and then select the status from the second list.
- **Stop Dialog**. Stops the current dialog. From the **Stop workflow with status of** list, select the status that you want to set for the stopped dialog.

c. If a **Set Properties** button appears next to the new action you added, click **Set Properties** and specify details about the entity that this step in your dialog is taking action on.

d. Click **Type a step description here** and replace the default text with a description of what your dialog step includes.

12. Click **Save** or **Save and Close**.

Add or change dynamic values in a dialog

Can I do this task?

This task requires permissions that are found in all default security roles. Customization tasks can be performed only while you are online. More information: *Customization Permissions* (on page 490)

You can use dynamic values in the entities or records that you use in a dialog, as well as in the conditions in the workflow logic you include in your dialog.

1. In the Navigation Pane, click **Settings**, and then under **Process Center**, click **Processes**.
2. Open the dialog that includes fields where you want to use dynamic values.
3. If you want to add dynamic values to fields in a condition, open the condition that includes the fields.

   - OR -

   If you want to add dynamic values to fields in an entity or record that a workflow action uses, click **Set Properties** for that entity or record.
4. If the **Form Assistant** pane is not displayed, click the **Expand** button .
5. Click the field where you want to insert a dynamic value.
6. Under **Dynamic Values** in the **Form Assistant** pane, from the **Operator** list, select a logical operator.
7. From the first list under **Look for**, select the entity or record that includes the attributes you want to insert as dynamic values.
8. From the second list under **Look for**, select the specific attribute you want to insert, and then click **Add**.
9. If you want Microsoft Dynamics CRM to insert alternative attribute values in cases when the attribute you specified in steps 4 through 6 is empty, repeat these steps to add additional attributes, and then use the **Move Up** and **Move Down** buttons to arrange the attributes in the order that you want Microsoft Dynamics CRM to evaluate them.
10. If you want Microsoft Dynamics CRM to insert static text when none of the attributes you have specified contain any data, in the **Default text** box, type the text that you want Microsoft Dynamics CRM to display instead of a dynamic value.
11. Click **OK**.

    The dynamic values appear as yellow boxes in the field where you inserted them.
12. In the form for the entity, record, or conditions used in your workflow, click **Save and Close**.
13. In the **Process Logic** area, click **Save** or **Save and Close**.

    Note
    You cannot edit dynamic values that you have already inserted in a field. To change a dynamic value, you must remove the old value and add a new one. Select the yellow box in the field for the value you want to change, press the Delete key on your keyboard, and then add the dynamic value you want to use in its place.

Related Topics

Work with Workflows 229
Creating and Using Workflows 223
Workflow Lifecycle 227

Activate or deactivate a dialog

Can I do this task?

This task requires permissions that are found in all default security roles. Customization tasks can be performed only while you are online. More information: *Customization Permissions* (on page 490)

Activating a dialog makes it available to use as an on-demand process or child process. You cannot use unactivated dialogs that are in a draft state.

1. In the Navigation Pane, click **Settings**, and then under **Process Center**, click **Processes**.
2. Select the dialog that you want to activate or deactivate.
3. To activate a dialog, on the Actions toolbar, click **Activate**.

   - OR -

   To deactivate a dialog, on the Actions toolbar, click **Deactivate**.
4. In the confirmation message, click **OK**.

Note

Dialogs cannot be started automatically.

Assign a process to another user

Can I do this task?

This task requires the System Administrator or System Customizer security role or equivalent permissions. More information about specific permissions and performing this task while offline: Configuration Permissions

You can assign a process (a workflow or dialog) you own, or have assign permissions for, to another user. The new owner will then have the control needed to edit, activate, deactivate, or delete the process.

1. In the Navigation Pane, click **Settings**, and then under **Process Center**, click **Processes**.
2. In the **Processes** list, select the **My Processes** view.
3. Double-click the process that you want to assign.
4. On the Actions toolbar, click **Actions**, and then click **Assign**.
5. In the **Confirm Assignment** dialog box, click **Assign to another user**.
6. In the **Assign the selected Process to the following user** list, click the **Lookup** button .
7. Click **OK**.

Notes

- When you assign a process to another user, Microsoft Dynamics CRM deactivates it. The new owner of the process must activate it again.
- When you assign a process to another user, it will no longer appear in your **My Processes** view in the **Processes** list.
- A process can be owned by only one user. To enable multiple users to control a process, share it.

Assign a process to yourself

Can I do this task?

This task requires permissions that are found in all default security roles. Customization tasks can be performed only while you are online. More information: *Customization Permissions* (on page 490)

You can make a process that you own or have share permissions for, available to other users by sharing it.

1. In the Navigation Pane, click **Settings**, and then under **Process Center**, click **Processes**.
2. In the **Processes** list, select the **My Processes** view.
3. Select the check box next to the process you want to share.
4. On the Actions toolbar, click **More Actions**, and then click **Sharing**.
5. In the **Who would you like to share the selected contacts with** dialog box, click **Add User/Team**.
6. In the **Look Up Records** dialog box, add the users whom you want to share the process with, and then click **OK**.
7. Select the permissions you want for each user:
   - **Read** enables the user to view and run the process.
   - **Write** enables a user to edit the process.
   - **Delete** enables the user to delete a process.
   - **Append** enables a user to add notes to a process.
   - **Assign** enables a user to assign the process to another user.
   - **Share** enables a user to share the process with other users.
8. Click **OK**.

Share a process with other users

Can I do this task?

This task requires permissions that are found in all default security roles. Customization tasks can be performed only while you are online. More information: *Customization Permissions* (on page 490)

You can assign a process (a workflow or dialog) that is owned by another user to yourself. You will then have the control needed to edit, activate, deactivate, or delete the process. A process can be owned by only one user. To enable multiple users to control a process, share it.

1. In the Navigation Pane, click **Settings**, and then under **Process Center**, click **Processes**.

2. In the **Processes** list, select the **All Processes** view.
3. In the list, select the process that you want to assign to yourself.
4. On the Actions toolbar, click **Assign**.
5. In the **Assign Process** dialog box, click **Assign to me**.
6. Click **OK**.

Notes

- When you assign a process to yourself, it remains in the same state, activated or deactivated, as it was before you reassigned it.
- When you assign a process to yourself, it will appear under your **My Processes** in the **Processes** list.

Start a dialog

If you or your organization have created dialogs, you can start a dialog for records that appear in a list.

Concepts:

- Creating and using dialogs

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

1. Open the list of records that contains the record for which you want to start a dialog, such as leads or cases.
2. Select the record on which you want to run a dialog.
3. In the **Process** group, click **Start Dialog**.
4. In the **Look Up Record** dialog box, select the dialog that you want to run, and then click **OK**.
5. In the confirmation message, click **OK**.

Notes

- A dialog cannot be started on multiple records.
- The **Start Dialog** button may not be available if you do not have permission to run dialogs for the record listed.

In the **Look Up Record** dialog box, you will see only dialogs that you own or have been given permissions to use.

Create or edit a dialog

Can I do this task?

This task requires the System Administrator or System Customizer security role or equivalent permissions. Customization tasks can be performed only while you are online. More information: *Customization Permissions* (on page 490)

1. In the Navigation Pane, click **Settings**, and then under **Process Center**, click **Processes**.
2. On the Actions toolbar, click **New**.
3. In the Create Process dialog box, set required properties for the dialog.
   a. In the **Process name** box, type the name that you want to use for this dialog.
   b. From the **Entity** list, select the primary entity that you want to use with this dialog.
   c. From the **Category** list, select **Dialog**.
   d. In the **Type** area, select whether you want to create a completely new process or whether you want to use a process template.

      If you want to view details about a process template, select the process template, and then click **Properties**.
   e. Click **OK**.
4. In the Process Properties area, set additional properties for the dialog.
   a. If you plan to publish this dialog to use for your business processes, from the **Activate As** list, select **Process**.

      - OR -

      If you plan to publish this dialog as a process template, from the **Activate As** list, select **Process template**.
   b. Under **Available to Run**, select how you want to make the dialog available to other users in your organization:
      - **As an on-demand process**. If you want to be able to start the dialog manually for a specified entity as an on-demand process, select this check box.
      - **As a child process**. If you want use the dialog as a child dialog, which means that it starts only when it is triggered within another dialog, select this check box.
5. Add input arguments to your dialog.

   You can use input arguments to pass data into a dialog that will be used as a child dialog.
   a. In the **Input Arguments** section, click **Add** to open the **Add or Modify Properties** dialog box.
   b. In the **Name** field, type a unique name for the input argument. This name is the identifier for the input argument and it should be clear enough to enable you to identify it later when you want to use it in a dialog.
   c. From the **Data type** list, select the data type for the input argument:
      - **Text** is an alphanumeric value.
      - **Integer** is a numeric value.
      - **Float** is a floating-point numeric value.

d. In the **Default Value** field, enter a default value for the input argument. The default value must match the data type you selected.

e. To save your changes and close the dialog box, click **OK**.

6. Add variables to your dialog.

   You can add variables to store data within a dialog for use later. For example, to insert data in fields for workflow activities that occur within the dialog:

   a. In the **Variables** section, click **Add** to open the **Add or Modify Properties** dialog box.

   b. In the **Name** box, type a unique name for the variable. This name is the identifier for the variable and it should be clear enough to enable you to identify it later when you want to use it in a dialog.

   c. From the **Data type** list, select the data type for the input argument:

      - **Text** is an alphanumeric value.
      - **Integer** is a numeric value.
      - **Float** is a floating-point numeric value.

   d. In the **Default Value** box, type a default value for the variable. The value must match the data type you selected.

   e. To save your changes and close the dialog box, click **OK**.

   Notes

   - Variables in dialogs have a global scope and can be accessed for any step in your dialog.
   - You can use variables as data slugs in the workflow logic for different action steps in your dialog.
   - You can use variables to maintain a running counter for determining a score based on responses in prompt and response steps.
   - You can use variables for computational values that can be used in a dialog by using the assign value step.

7. Add stages to your dialog.

   In the **Process Logic** area in the lower half of the **Process** form, you can add stages to your dialog.

   a. Under **Steps**, click where you want to add the stage.

   b. On the Process Logic toolbar, click **Add Step** and select **Stage**.

   c. Click **OK**.

   d. Click **Type a stage description here** and replace the default text with a description of what your dialog stage includes.

   Note: If you add a stage to a dialog, then all steps and pages must be contained within a stage. If necessary, Microsoft Dynamics CRM will organize steps that already exist into a stage when you add a new stage.

8. Add pages to your dialog.

   You must add at least one page to a dialog. Pages contain the prompt and response steps that make up the basic structure of a dialog.

a. Under **Steps**, click where you want to add the page.

b. On the Process Logic toolbar, click **Add Step** and select **Page**.

c. Click **Type a description here** and replace the default text with a description of the page.

9. Add prompt and response steps to your dialog.

   You must add at least one prompt and response step to a page your dialog.

   a. Select the line in your dialog page where you want to add the prompt and response step.

   b. On the Process Logic toolbar, click **Add Step** and select **Prompt and Response**.

   c. Under **Steps**, click **Set Properties**.

   d. In the **Define Prompt and Response** dialog box, in the **Prompt Details** section, type the text the user sees when they use the dialog.

      1. In the **Prompt Text** box, type a question or instructions for the prompt.
      2. In the **Tip Text** box, type an optional tip to help clarify the prompt.

   e. In the **Response Details** section, set the details for the response.

      1. From the **Response Type** list, select a response type.
         - Select **None** to have a prompt that allows no response. A prompt with no response may be an instruction to take some external action, such as calling a contact, before proceeding to the next prompt.
         - Select **Single Line** to provide a response that consists of a single line of text with no more than 255 characters, including spaces.
         - Select **Option Set (radio buttons)** to provide a specified set of responses that are displayed as radio buttons in the dialog.
         - Select **Option Set (picklist)** to provide a specified set of responses that are available from a picklist in the dialog.
         - Select **Multiple Lines of Text (Text Only)** to provide a response that consists of multiple lines of text with no more than 255 characters, including spaces.
      2. From the **Data type** list, select a data type for the response.
         - **Text** is an alphanumeric value.
         - **Integer** is a numeric value.
         - **Float** is a floating-point numeric value.
      3. If you selected **Single Line** or **Multiple Lines (Text Only)** as the response type, type a default value in the **Default Value** box, and then, next to **Log Response**, select whether or not to log the response so that it can be used in another place in the dialog.
      4. If you selected **Option Set (radio buttons)** or **Option Set (picklist)** as the response type, for **Provide Values**, select how you will provide values for the response.
         - **Define Values** enables you to define your own values to the response.
         - **Query CRM Data** enables you to provide values from a record in Microsoft Dynamics CRM.

f. Click **Save and Close**.

g. Click **Type a step description here** and replace the default text with a description of what your dialog step includes.

10. Add steps to your dialog.

    In the **Process Logic** area in the lower half of the **Process** form, you can add a check condition step to your dialog. This step checks the data in the entity where you are running the dialog and performs an assigned action.

    a. Under **Steps**, click where you want to add the check condition step.

    b. On the Process Logic toolbar, click **Add Step**, and then select **Check Condition**. You can add a check condition at any level in your workflow logic.

       After you have added a check condition to your workflow, you can add one or more conditional branches and assign a default action to the check condition:

       - **Conditional Branch**. Adds a conditional branch to the workflow. To add a conditional branch, you must select the **If** line in a check condition or the **Otherwise, if** line in another conditional branch.

       Note that more than six levels of conditional branching are not displayed.

       - **Default Action**. Adds a default action to the **If** dialog box. You can include only one default action associated with a check condition. To add a default action, you must select the **If** line in a check condition or the **Otherwise, if** line in a conditional branch.

    c. Click **condition**.

    d. In the **Specify Condition** dialog box, select the condition for the step:

       Tip: After you specify one condition, move your cursor over the area to the right of the condition you just specified. New fields appear, in which you can specify additional details about the condition.

       1. In the first list, select a primary entity or related entity.
       2. In the second list, select a field in the entity you selected in the previous step.
       3. In the third list, select the logical operator that best fits the condition you want to specify, such as **Contains** or **Equals**.
       4. In the last lists or boxes, enter the values that you want to use as the criteria for your condition.
       5. Click **Save and Close**.

       Tip: You can specify multiple conditions for a single process step. After you select an entity from the first column, a second line appears, where you can specify another condition. The process considers the conditions to have been met only when an event matches all of the criteria.

    e. In the **Process Logic** area, click **Type a step description here** and replace the default text with a description of what your check condition step includes.

11. Add actions to your dialog.

    In the **Process Logic** area in the lower half of the **Process** form, you can add actions to your dialog.

    a. Under **Steps**, click where you want to add an action.

    b. On the Process Logic toolbar, click **Add Step**, and then select one of the following items:

- **Query CRM Data**. Queries a Microsoft Dynamics CRM record to return specified data.
- **Assign Value**. Assigns a specified value to a variable or input argument that you have set up for the dialog.
- **Create Record**. Creates a new record. From the **Create** list, select the entity for which you want to create individual records.
- **Update Record**. Updates a record. From the **Update** list, select the record that you want to update.
- **Assign Record**. Assigns a record from one user to another user. From the **Assign** list, select the record that you want to reassign, and then click the **Lookup** button and select the user you want to assign the record to.
- **Send E-mail**. Sends an e-mail notification. From the **Send e-mail** list, select whether you want to create a new e-mail message or use an e-mail template.
- **Start Child Workflow**. Starts a child workflow. From the **Start child workflow** list, select the primary entity of the child workflow you want to use, and then click the **Lookup** button and select the child workflow.
- **Link Child Dialog**. Starts a child dialog. From the **Link Child Dialog** list, select the primary entity of the child dialog you want to use, and then click the **Lookup** button and select the child dialog.

  Note: A link to a child dialog is the last action or step you should have in a dialog. When the dialog runs, the link to a child dialog takes you away from the parent dialog and you can't return to it. Any steps that follow the link to a child dialog will be ignored.
- **Change Status**. Changes the status of a record. From the first **Change status** list. Select the record that you want to change the status of and then select the status from the second list.
- **Stop Dialog**. Stops the current dialog. From the **Stop workflow with status of** list, select the status that you want to set for the stopped dialog.

c. If a **Set Properties** button appears next to the new action you added, click **Set Properties** and specify details about the entity that this step in your dialog is taking action on.

d. Click **Type a step description here** and replace the default text with a description of what your dialog step includes.

12. Click **Save** or **Save and Close**.

Add or change dynamic values in a dialog

Can I do this task?

This task requires permissions that are found in all default security roles. Customization tasks can be performed only while you are online. More information: *Customization Permissions* (on page 490)

You can use dynamic values in the entities or records that you use in a dialog, as well as in the conditions in the workflow logic you include in your dialog.

1. In the Navigation Pane, click **Settings**, and then under **Process Center**, click **Processes**.
2. Open the dialog that includes fields where you want to use dynamic values.

3. If you want to add dynamic values to fields in a condition, open the condition that includes the fields.

   - OR -

   If you want to add dynamic values to fields in an entity or record that a workflow action uses, click **Set Properties** for that entity or record.

4. If the **Form Assistant** pane is not displayed, click the **Expand** button .
5. Click the field where you want to insert a dynamic value.
6. Under **Dynamic Values** in the **Form Assistant** pane, from the **Operator** list, select a logical operator.
7. From the first list under **Look for**, select the entity or record that includes the attributes you want to insert as dynamic values.
8. From the second list under **Look for**, select the specific attribute you want to insert, and then click **Add**.
9. If you want Microsoft Dynamics CRM to insert alternative attribute values in cases when the attribute you specified in steps 4 through 6 is empty, repeat these steps to add additional attributes, and then use the **Move Up** and **Move Down** buttons to arrange the attributes in the order that you want Microsoft Dynamics CRM to evaluate them.
10. If you want Microsoft Dynamics CRM to insert static text when none of the attributes you have specified contain any data, in the **Default text** box, type the text that you want Microsoft Dynamics CRM to display instead of a dynamic value.
11. Click **OK**.

    The dynamic values appear as yellow boxes in the field where you inserted them.

12. In the form for the entity, record, or conditions used in your workflow, click **Save and Close**.
13. In the **Process Logic** area, click **Save** or **Save and Close**.

Note
You cannot edit dynamic values that you have already inserted in a field. To change a dynamic value, you must remove the old value and add a new one. Select the yellow box in the field for the value you want to change, press the Delete key on your keyboard, and then add the dynamic value you want to use in its place.

Related Topics

Work with Workflows 229
Creating and Using Workflows 223
Workflow Lifecycle 227

Activate or deactivate a dialog

Can I do this task?

This task requires permissions that are found in all default security roles. Customization tasks can be performed only while you are online. More information: *Customization Permissions* (on page 490)

Activating a dialog makes it available to use as an on-demand process or child process. You cannot use unactivated dialogs that are in a draft state.

1. In the Navigation Pane, click **Settings**, and then under **Process Center**, click **Processes**.
2. Select the dialog that you want to activate or deactivate.
3. To activate a dialog, on the Actions toolbar, click **Activate**.

   - OR -

   To deactivate a dialog, on the Actions toolbar, click **Deactivate**.
4. In the confirmation message, click **OK**.

Note

Dialogs cannot be started automatically.

Assign a process to yourself

Can I do this task?

This task requires permissions that are found in all default security roles. Customization tasks can be performed only while you are online. More information: *Customization Permissions* (on page 490)

You can assign a process (a workflow or dialog) that is owned by another user to yourself. You will then have the control needed to edit, activate, deactivate, or delete the process. A process can be owned by only one user. To enable multiple users to control a process, share it.

1. In the Navigation Pane, click **Settings**, and then under **Process Center**, click **Processes**.
2. In the **Processes** list, select the **All Processes** view.
3. In the list, select the process that you want to assign to yourself.
4. On the Actions toolbar, click **Assign**.
5. In the **Assign Process** dialog box, click **Assign to me**.
6. Click **OK**.

Notes

- When you assign a process to yourself, it remains in the same state, activated or deactivated, as it was before you reassigned it.
- When you assign a process to yourself, it will appear under your **My Processes** in the **Processes** list.

Assign a process to another user

Can I do this task?

This task requires the System Administrator or System Customizer security role or equivalent permissions. More information about specific permissions and performing this task while offline: Configuration Permissions

You can assign a process (a workflow or dialog) you own, or have assign permissions for, to another user. The new owner will then have the control needed to edit, activate, deactivate, or delete the process.

1. In the Navigation Pane, click **Settings**, and then under **Process Center**, click **Processes**.

2. In the **Processes** list, select the **My Processes** view.
3. Double-click the process that you want to assign.
4. On the Actions toolbar, click **Actions**, and then click **Assign**.
5. In the **Confirm Assignment** dialog box, click **Assign to another user**.
6. In the **Assign the selected Process to the following user** list, click the **Lookup** button .
7. Click **OK**.

Notes

- When you assign a process to another user, Microsoft Dynamics CRM deactivates it. The new owner of the process must activate it again.
- When you assign a process to another user, it will no longer appear in your **My Processes** view in the **Processes** list.
- A process can be owned by only one user. To enable multiple users to control a process, share it.

Share a process with another user

Can I do this task?

This task requires permissions that are found in all default security roles. Customization tasks can be performed only while you are online. More information: *Customization Permissions* (on page 490)

You can make a process that you own or have share permissions for, available to other users by sharing it.

1. In the Navigation Pane, click **Settings**, and then under **Process Center**, click **Processes**.
2. In the **Processes** list, select the **My Processes** view.
3. Select the check box next to the process you want to share.
4. On the Actions toolbar, click **More Actions**, and then click **Sharing**.
5. In the **Who would you like to share the selected contacts with** dialog box, click **Add User/Team**.
6. In the **Look Up Records** dialog box, add the users whom you want to share the process with, and then click **OK**.
7. Select the permissions you want for each user:
   - **Read** enables the user to view and run the process.
   - **Write** enables a user to edit the process.
   - **Delete** enables the user to delete a process.
   - **Append** enables a user to add notes to a process.
   - **Assign** enables a user to assign the process to another user.
   - **Share** enables a user to share the process with other users.
8. Click **OK**.

Create or add a location for the first time

Can I do this task?

This task requires permissions that are found in all default sales security roles. More information about specific permissions and performing this task while offline: Document Management Permissions

Before you can manage documents for a record from Microsoft Dynamics CRM, you must create a location record in Microsoft Dynamics CRM that points to libraries and folders on SharePoint where the documents will be stored.

1. Open the Microsoft Dynamics CRM record that has the documents you want to manage.
2. Under **Related**, click **Documents**.
3. If a location is not associated, Microsoft Dynamics CRM will display the **Add Document Location** dialog box or **Create SharePoint Location** dialog box. The following table shows the possible scenarios. Depending upon what you see, perform the steps in the Next Steps column.

Scenario	What Appears	Next Steps
There is at least one site record in Microsoft Dynamics CRM that points to site collection in SharePoint, and the site record has the **List component is installed** check box selected.	**Add Document Location** opens with an option to specify either an absolute URL or a relative URL.	a. In the **Name** box, verify or type the name. The document location record is created in Microsoft Dynamics CRM with this name. b. In the **Document Location** box, enter the URL of the SharePoint folder to which the location record points. This location is associated with the Microsoft Dynamics CRM record to store the documents. - OR - Click **Create a new folder**. In the **Parent Site or Location** box, click the **Lookup** button to select an existing document location record under which the folder will be created on SharePoint. In the **Folder Name** box, verify or change the name, and click **OK**. A folder with this name is created in SharePoint. c. Click **Save**.

Scenario	What Appears	Next Steps
There is one site record in Microsoft Dynamics CRM but the **List component is installed** check box is not selected.	**Add Document Location** appears with only the absolute URL option.	a. In the **Name** box, verify or type a name. The document location record is created in Microsoft Dynamics CRM with this name. b. In the **Document Location** box, enter the URL of the SharePoint folder to which the location record points. This location record is associated with the Microsoft Dynamics CRM record to store the documents. c. Click **Save**.
There is no existing location associated with the record, the URL specified in the **Document Management Settings** wizard is for a site collection on SharePoint Server 2010, and this site record has the **List component is installed** check box selected.	**Create SharePoint Location** appears.	Microsoft Dynamics CRM tries to automatically create a folder in SharePoint. If the folder is created successfully, Microsoft Dynamics CRM opens **Create SharePoint Location** with the URL of the new folder. Microsoft Dynamics CRM creates a document location record that contains the URL of this new folder and associates the document location record with the Microsoft Dynamics CRM record. Click **OK**.

A new document location record is created in Microsoft Dynamics CRM that contains the links to the folders in SharePoint. The location that you just associated is added to the **Document Locations** list.

Related Topics

Fix a location 256

Add or edit a location

Can I do this task?

This task requires permissions that are found in all default sales security roles. More information about specific permissions and performing this task while offline: Document Management Permissions

1. Open the Microsoft Dynamics CRM record that has the documents you want to manage.
2. Under **Related**, click **Documents**.
3. In the **Document Locations** group, click **Add Location**.
4. In **Add Document Location**, enter the following information:
   - **Name**. Enter a descriptive name that is easy to use for the document location.
   - **Document Location**. Specify the URL of the SharePoint folder that you want to use as the location for this record.

- Use an existing SharePoint folder. Click **Specify the URL of an existing SharePoint folder** and paste the existing URL of the SharePoint folder here.

  - OR -

- Create a new SharePoint folder. Click **Create a new folder**. In the **Parent Site or Location** box, click the **Lookup** button and select a parent site. In the **Folder Name** box, the Microsoft Dynamics CRM record name is added by default. Verify the name.

  The option of creating a location under a parent URL is shown only if there is at least one site record in Microsoft Dynamics CRM with the **List component is installed** check box selected.

5. Click **Save**.

   A folder is created in SharePoint. A document location record containing the link to the folder is created in Microsoft Dynamics CRM.

Note
To update a location that was associated previously, click the location that you want to edit in the **Document Locations**. In the **Document Locations** group, click **Edit Location**.

Related Topics

Fix a location 256

Fix a location

Can I do this task?

This task requires permissions that are found in all default sales security roles. More information about specific permissions and performing this task while offline: Document Management Permissions

In Microsoft Dynamics CRM, SharePoint document location records contain links to document libraries and folders on SharePoint. These document location records are associated with Microsoft Dynamics CRM records so that the documents for Microsoft Dynamics CRM records could be stored in SharePoint.

Sometimes the links between Microsoft Dynamics CRM and SharePoint break. As an example, a SharePoint user can change the name of a folder (document location). If this happens, you must fix the folder so that the Microsoft Dynamics CRM records again point to the correct document location.

1. Open the Microsoft Dynamics CRM record that has the documents you want to manage.
2. Under **Related**, click **Documents**.

   If the location URL is broken, **Local URL Not Found** opens.

3. Click **Change URL**.
4. In **Edit Document Location**, change or verify the information:

   - **Display Name**. Enter a descriptive and easy to use name for the document location. The location is stored with this name.

- **Specify the URL of an existing SharePoint folder**. Use this option if you have an existing location that you want to add to this record. Specify the URL of an existing folder on SharePoint.
- **Specify the name of an existing folder or create a new folder**. Use this option to specify an existing folder or create a new folder. In the **Parent Site or Location** box, click the **Lookup** button , and select an existing document location record that points to a document library on SharePoint. In the **Folder Name** box, change the name of the location (SharePoint folder) if needed.

5. Click **Save**.

Related Topics

Use documents stored in SharePoint from Microsoft Dynamics CRM

Can I do this task?

This task requires permissions that are found in all default sales security roles. More information about specific permissions and performing this task while offline: Document Management Permissions

Before you can store documents for a record in SharePoint, you must do the following:

- Enable document management for the record type.
- Make sure that the corresponding folders are created in SharePoint to store the documents.

Important

If the site that you are using to store the documents is on Microsoft SharePoint Server 2010, and if the site collection under which the site is hosted has the Microsoft Dynamics CRM List component installed, Microsoft Dynamics CRM delivers the documents similar to other list of records in Microsoft Dynamics CRM. However, if the site that you are using to store the documents is not on Microsoft SharePoint Server 2010 or if the site collection under which the site is hosted does not have the Microsoft Dynamics CRM List component installed, the documents are displayed in an IFrame instead of a Microsoft Dynamics CRM list. To make it look like a Microsoft Dynamics CRM list, ask your administrator to install the Microsoft Dynamics CRM List component on the SharePoint site collection.

1. Open the Microsoft Dynamics CRM record that has the documents you want to manage.
2. Under **Related**, click **Documents**.
3. From the **Document Locations** list, click the location that has the documents that you want to manage or work on.
4. Perform any of the following tasks.

Basic Tasks	
Tasks	**Do This**
Create a document using a template	On the Actions toolbar, click **New**, and then click **Document**. **Note** When you create a document using a template and try to save it, Microsoft Dynamics CRM suggests a location (SharePoint folder) in **Save As** when saving the document. If you save the document to a location other than the one that is suggested, the document is not visible in the Documents area.
Create a folder	On the Actions toolbar, click **New**, and then click **Folder**.
Add a document from your computer and store it in the SharePoint folder	On the Actions toolbar, click **Add**.
Edit a document	On the Actions toolbar, click **Edit**.
Delete a document from the SharePoint site	On the Actions toolbar, click the **Delete** button .

Additional Tasks	
Tasks	**Do This**
Check out a selected document	On the Actions toolbar, click **Actions**, and then click **Check Out**.
Check in a document that is checked out	On the Actions toolbar, click **Actions**, and then click **Check In**.
Discard any changes to a checked-out document and keep the last version.	On the Actions toolbar, click **Actions**, and then click **Discard**.
Receive a notification when a document changes	On the Actions toolbar, click **Actions**, and then click **Alert Me**.
Download a copy of the selected document to your local computer	On the Actions toolbar, click **Actions**, and then click **Download a Copy**.
Copy the shortcut of the selected location where the document is stored	On the Actions toolbar, click **Actions**, and then click **Copy Shortcut**.
Send the shortcut of the document location to another user	On the Actions toolbar, click **Actions**, and then click **Send Shortcut**.

View the properties of a selected document	On the Actions toolbar, click **Actions**, and then click **View Properties**.
Edit the properties of a selected document	On the Actions toolbar, click **Actions**, and then click **Edit Properties**.
View the version history of a document	On the Actions toolbar, click **Actions**, and then click **Version History**.
Open the document location in SharePoint in a different browser window	On the Actions toolbar, click **Open** SharePoint.

Important

The document actions are available to you based on the permissions you have on the SharePoint document library.

For more information about the SharePoint Document Management capabilities, see the Microsoft SharePoint Server 2010 documentation.

Work with Announcements

You can view Announcements in the Workplace area.

View announcements

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Configuration Permissions

- Under **Workplace**, click **Announcements**.

Related Topics

Work with Announcements 259

Can I do this task?

This task requires a manager, vice president, CEO-Business Manager, System Administrator, or System Customizer security role or equivalent permissions. More information about specific permissions and performing this task while offline: Configuration Permissions

1. In the Navigation Pane, click **Settings**, click **Administration**, and then click **Announcements**.
2. On the Actions toolbar, click **New**.

3. On the **Announcement** tab, enter information or observe any noted restrictions or requirements as needed:

   - **Title**

     Enter a title that clearly and unambiguously describes the nature and purpose of the announcement.

   - **Body**

     Enter the entire text of the announcement. You can cut and paste an announcement text from another application. However, any formatting will be lost.

4. Under Additional Settings, you can also enter additional information.

   - **More Information URL**

   Enter a Web address path for a Web site with more details related to the announcement. A Web address that does not include "http://" is automatically expanded to a full Web address.

   In the announcement, the Web address is an active external link.

   - **Expiration Date**

   Enter the expiration date for the announcement, or click the **Select Date** button to select the date.

   When an announcement expires, its expiration date cannot be updated. Microsoft Dynamics CRM removes it from the Announcements area, and you must create a new announcement.

5. Click **Save** or **Save and Close**.

   Note

   You must enter the date in the format your organization has set for dates. For example, 01/01/2006 or 31.12.2005.

   If you omit leading zeros in a date, Microsoft Dynamics CRM will add them automatically. For example, when you type 1/1/06, Microsoft Dynamics CRM will display it as 01/01/2006, if that is the date format of your organization.

Related Topics

Delete Things 19

Work with Integrated Instant Messaging

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

If you have Microsoft Office Communicator 2007, MSN Messenger, or Live Messenger installed, you can send an instant message to any user, contact, opportunity, or lead in Microsoft Dynamics CRM with an e-mail address and using one of the instant messaging applications listed.

Note

You may need to add the Microsoft Dynamics CRM server URL to the list of Internet Explorer trusted sites for the online presence to display. See online Help in Internet Explorer for instructions.

Record types and columns that can display online presence

- Contact records: **Full Name**
- Lead records: **Primary Contact**
- Opportunity records: **Potential Customer**
- All customer records: **Users**
- All customer records: **Owner**
- All customer records: **Modified By**

To access the menu, click the **Online Presence Jewel** .

- A green jewel indicates the person can receive an instant message and is available.
- A red jewel indicates the person is busy. You can send a message, but they may not respond immediately.
- A yellow jewel indicates the person is away or out of the office.
- A orange jewel indicates the person's online status is unknown. There are other communication methods available from the menu.

Enabling online presence

There are two ways to enable the online presence for a personal view. Adding the associated e-mail address for a user or contact enables online presence on the related column. For example, adding the owner's e-mail column to a view enables the presence on the owner column.

If you do not want to include the e-mail column, you can also customize the view to enable online presence.

These two example procedures describe how to add a presence to a saved view. If you have the correct permissions, you can also edit a system view for an entity to enable the presence. More information: Work with Views

To add an e-mail column to a saved view

a. In the list view you want to add online presence, click **Advanced Find**.

b. In the **Advanced Find** form, click **Edit Columns**.

c. In **Common Tasks**, click **Add Columns**

d. Select one of the e-mail related check boxes. For example, select **E-mail**.

e. Click **OK** twice.

f. In the **Advanced Find** form, click **Find**.

To save the view, click **Back to Query**, and then, on the Actions toolbar, click **Save As**.

To enable the online presence on a column in a saved view

a. In the Accounts or Contacts area, click **Advanced Find**.

b. In the **Advanced Find** form, click **Edit Columns**.

c. Do one of the following:

   a. Select one of the columns that can display online presence, such as **Full Name** and then click **OK**.

   b. Select the **Full Name** column, and then click **Change Properties**.

   c. Select the **Enable Presence for this column** check box, and then click **OK**.

   d. To save your changes and close the dialog box, click **OK**.

   e. In the **Advanced Find** form, click **Find**.

      To save the view, click **Back to Query**, and then on the Actions toolbar, click **Save As**.

Note
You cannot enable presence on columns for related record types or on deleted columns.

Related Topics

Understanding Entities 517

Send or Copy a Shortcut

Only another Microsoft Dynamics CRM user who has permission to see the view or the record will be able to open the record.

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

You can send a link to a specific record or group of selected records in Microsoft Dynamics CRM in an e-mail message to any user.

This feature does not use Microsoft Dynamics CRM e-mail; it uses your default Microsoft Internet Explorer e-mail. If the person receiving the e-mail does not have permissions to the view, they will receive an error. Not all views are available. No activity is created for this action.

You can also copy the shortcut and paste it into any document.

1. In the list of records, select the record that you want.

   Or, select multiple records

   - Select several records by pressing the CTRL key while you click each record.
   - Select a sequence of records by clicking the first record that you want, and then press the SHIFT key while you select the last record that you want.
   - Select all records on the page by selecting the **Select/clear all records on this page** check box at the top of the list.

By default, the Microsoft Dynamics CRM Web application displays 50 records per page. You can increase this up to a maximum of 250 records per page to increase the number of records you can select at one time. To increase the number of records displayed per page:

1. On the **File** menu, click **Options**.
2. On the **General** tab, in the **Records Per Page** list, select the number of records to display per page.
3. Click **OK**. This changes the number of items that is displayed for all lists, which may slow response time when you switch record types. Therefore, you might want to set it back to a smaller number when you are done with this bulk action.

2. Do one of the following:

Send a shortcut in an e-mail

a. On the Actions toolbar, click **E-mail a Link**, and then click **Of Selected Item**.

f. Complete the e-mail form and send.

Tip

If you are working in Microsoft Dynamics CRM for Outlook and you want to track this e-mail, you can use **Track in CRM**.

Copy a shortcut

a. On the Actions toolbar, click **Copy a Link**, and then click **Of Selected Item**.

g. Paste the shortcut into any application that supports copy and paste. For example, in Microsoft Office Word, press CTRL+V.

Important

The shortcut is not a snapshot of the data, but a link to the live data.

Related Topics

Find Things 9

Save Outlook Contacts, Tasks, and E-mail Messages as Microsoft Dynamics CRM Records 465

Send or copy a shortcut to a view

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

You can send a link to a specific saved view in Microsoft Dynamics CRM in an e-mail message to any user.

This feature does not use Microsoft Dynamics CRM e-mail; it uses your default Microsoft Internet Explorer e-mail. If the person receiving the e-mail does not have permissions to the view, they will receive an error. Not all views are available. No activity is created for this action.

You can also copy the shortcut and paste it into any document.

Pages that you cannot e-mail or copy

- Contract Template list
- Article list

1. In any available, saved view, do one of the following:

   Send a shortcut in an e-mail

   a. On the Actions toolbar, click **E-mail a Link**, and then click **Of Selected Item**.

   b. Complete the e-mail form and send.

   Tip

   If you are working in Microsoft Dynamics CRM for Outlook and you want to track this e-mail, you can use **Track in CRM**.

   Copy a shortcut

   a. On the Actions toolbar, click **Copy a Link**, and then click **Of Selected Item**.

   b. Paste the shortcut into any application that supports copy and paste. For example, in Microsoft Office Word, press CTRL+V.

   Important

   The shortcut is not a snapshot of the data, but a link to the live data.

Related Topics

Find Things.....9

Save Outlook Contacts, Tasks, and E-mail Messages as Microsoft Dynamics CRM Records 465

Sales

Managing Accounts and Contacts

In Microsoft Dynamics CRM, you can manage, share, and collaborate on accounts and contacts within your organization.

You can enter accounts or contacts individually or you can use Microsoft Dynamics CRM to import lists of these records into the database.

Associate an account or contact with an opportunity

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Sales Permissions

You associate opportunities with accounts or contacts by creating an opportunity relationship between them. The relationship you set up is based on your selections on the **Opportunity Relationship** form. Therefore, if you want to create a relationship between an account or contact and an opportunity, be sure that you complete the form.

1. In the Navigation Pane, click **Sales**, and then click **Opportunities**.
2. In the list of opportunities, open the opportunity to which you want to add a relationship with a customer record.
3. Click the **Add** tab. In the **Create Relationship** group, click **Relationship**.
4. On the **Opportunity Relationship** form, enter this information:
   - **Opportunity**

     This is a required field. If you opened the form from an opportunity record, the opportunity is automatically listed on the form. Click the **Lookup** button to select a different opportunity.
   - **Customer**

     This is a required field. If you opened the form from an account or contact record, the account or contact is automatically listed on the form. Click the **Lookup** button to search for and select an account or contact.
   - **Customer Role**

     Select an option from the list. This field can be customized, so the values will vary.

     Your organization might set up relationship roles, to indicate the role of your customers as they relate to your business. This field is not required.

If there are no relationship roles in the list or the relationship role you want is not listed, contact your system administrator and ask them to add the relationship role to the **Relationship Roles** area, which is located in the **Settings** area.

- **Description**

  Use this field to provide additional information about the relationship.

5. Click **Save** or **Save and Close**.

   Repeat this step to save the account or contact.

   Notes

   - To remove a relationship, open the opportunity, and then under **Common**, click **Relationships**. In the relationships list, click the relationship that you want to delete, and then, on the Actions toolbar, click the **Delete** button .
   - You cannot set up duplicate relationships between a customer record and an opportunity. For example, if you create a relationship between an account and the opportunity, and the customer's relationship role is set to Distributor, you cannot create a new relationship for the account that uses the same customer opportunity and relationship role.

Related Topics

Work with Opportunities 310
Managing Opportunities 310

Set customer preferences for a service activity

Can I do this task?

This task requires permissions that are found in all default service scheduling security roles.More information about specific permissions and performing this task while offline: Service Scheduling Permissions

You can provide personalized customer service for your customers by recording their preferences regarding services and service times. These preferences become the default criteria the next time that a service activity is scheduled for the customer and shown in the **Form Assistant** pane.

1. In the Navigation Pane, click **Workplace**, and then under **Customers**, click either **Accounts** or **Contacts**.
2. In the list, double-click a record.
3. Under **Information**, click **Common**.
4. Under **Service Preferences**, click the customer's preferred time and day for appointments from the lists.
5. Click the **Preferred Service**, **Preferred Facility/Equipment**, or **Preferred User** box to search for the this information. You can click the **Lookup** button to search for and select records.
6. Click **Save** or **Save and Close**.

Related Topics

Work with Contacts 276
Work with Accounts 271
Navigating the Service Calendar 427

Add or remove a customer record in a marketing list

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Sales Permissions

You can add a customer record, such as a lead, account, or contact, to a marketing list. If a customer record is added to a marketing list from another area within Microsoft Dynamics CRM, the customer record is updated to reflect this association. Therefore, if you want to add a customer record, such as a lead, to a marketing list, you might find that the lead is already associated with the list.

1. In the Navigation Pane, click **Sales**, and then click **Leads**, **Accounts**, or **Contacts** depending on which type of record you want to add to a marketing list.
2. In the list, open the record that you want to add to a marketing list.
3. In the **Collaborate** group, click **Add to Marketing List**.
4. In the **Look Up Record** dialog box, locate and select the marketing list you want to add the record to, and then click **OK**.
5. Click **Save** or **Save and Close**.

Note

To remove a record from a marketing list, open the customer record you want to remove from the marketing list. In the Navigation Pane, under **Marketing**, click **Marketing Lists**. Select the marketing list that you want to remove, and then, in the **Records** group, click **Remove**. In the confirmation message, click **OK**.

Tip

If you cannot locate the marketing list you want to add, you might need to create it. To do this, in the **Look Up Records** dialog box, click **New** and then complete the form.

Related Topics

Work with Contacts 276
Work with Accounts 271
Managing Accounts and Contacts 265
Work with Leads 299
Managing Leads 289
Work with Marketing Lists 389

View associated campaigns from customer records

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Sales Permissions

You can view a list of campaigns for a customer from within the Customer Record form. When a customer record is added to a marketing list and that marketing list is added to a campaign, the customer record is updated to reflect this association.

1. In the Navigation Pane, click **Sales**, and then click **Leads**, **Accounts**, or **Contacts**, depending on which type of record you want to view associated campaigns for.
2. In the list, open the record that you want to view.
3. Under **Marketing**, click **Campaigns** to see the list of campaigns the customer is included in.

Related Topics

Work with Contacts 276
Work with Leads 299
Managing Leads 289
Work with Accounts 271
Managing Accounts and Contacts 265
Work with Campaigns and Campaign Templates 375

Add or remove a customer relationship for an account or contact

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Sales Permissions

In Microsoft Dynamics CRM, you can create relationships between one customer record and one or more other records. These relationships are defined by their relationship role. The relationship that you set up is based on your selection on the **Customer Relationship** form.

1. In the Navigation Pane, click **Sales**, and then click either **Accounts** or **Contacts**.
2. In the list of accounts or contacts, open the record that you want.
3. In the record, click the **Add** tab.
4. In the **Create Relationship** group, click **Relationship**, and then select, **Customer Relationship**.
5. On the **Customer Relationship** form, enter information in the following boxes:
   - **Party 1**

     This field automatically displays the name of the customer whose record you opened.
   - However, you can click the **Lookup** button to search for and select a different account or contact record. If you do so, the new relationship that you set up will not appear in the customer record that you originally opened.
   - **Party 2**

     Select the customer record that you want to associate with the **Party 1** record. Click the **Lookup** button to search for an account or contact record.
   - **Role 1**

     Select an option from the list. This field can be customized, so the values will vary.

     Your organization might set up relationship roles, to indicate the role of your customers as they relate to your business. This field is not required.

     If there are no relationship roles in the list or the relationship role you want is not listed, contact your system administrator and ask them to add the relationship role to the **Relationship Roles** area, which is located in the **Settings** area.
   - **Description 1**

     Use this field to provide additional information about the relationship.
   - **Role 2**

     In the list, click the relationship role that best describes the relationship of **Party 1** to **Party 2**. The same items will appear in the list for Role 1 and Role 2.

     For example, if you selected **Supplier** from **Role 1**, you might select **Retailer** from **Role 2**.
   - **Description 2**

     Use this field to provide additional information about the relationship.
6. Click **Save** or **Save and Close**.
7. Close the account or contact record.

Important

You cannot create duplicate relationships between records. For example, if there is already a relationship between the account Fabrikam, Inc, with the role of distributor, and the account, Litware, Inc, with the role of seller, you cannot create the same relationship between the records.

Note

To remove a relationship, open the account or contact, and then in the Navigation Pane, under **Common**, click **Relationships**. In the list of relationships, select the relationship that you want to delete, and then on the Actions toolbar, click the **Delete** button . Deleting the relationship does not delete the customer records.

Related Topics

Work with Contacts 276
Managing Accounts and Contacts 265
Work with Accounts 271

Deactivate or activate an account or contact

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Sales Permissions

Instead of deleting an account or contact, you can deactivate it and still have an audit trail for your sales process. When an account or contact is deactivated, it cannot be edited, and relationships between the account or contact and other records cannot be created.

The only way to view a deactivated account or contact is to select **Inactive Accounts** or **Inactive Contacts** in the **View** list. If the representative of the account or the individual contact for the record that you deactivated contacts you in the future, you have the option of reactivating the account or contact without reentering all the data.

1. In the Navigation Pane, click **Sales**, and then click either **Accounts** or **Contacts**.
2. Select the accounts or contacts that you want to deactivate or activate.
3. In the **Records** group, click **Deactivate**.

   - OR -

   - In the **Records** group, click **Activate**.
4. In the confirmation dialog box, click **OK**.

Note

When you deactivate a record, all relationships created while it was active continue to be available; however, you cannot create new relationships with a deactivated record.

Related Topics

Work with Contacts 276
Work with Accounts 271
Managing Accounts and Contacts 265

Work with Accounts

Accounts represent companies that your organization may do business with.

Concepts: *Managing Accounts and Contacts* (on page 265)

Managing Accounts and Contacts

In Microsoft Dynamics CRM, you can manage, share, and collaborate on accounts and contacts within your organization.

You can enter accounts or contacts individually or you can use Microsoft Dynamics CRM to import lists of these records into the database.

Create or edit an account

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Sales Permissions

1. In the Navigation Pane, click **Sales**, and then click **Accounts**.
2. In the **Records** group, click **New** or open the record that you want to edit.
3. In the **General** section, enter or edit information or observe any noted restrictions or requirements as needed:
   - **Account Name**

     You can use accent marks when you enter data, for example, in a customer's name. Your ability to sort and find information is not affected by these accent marks.
   - **Primary Contact**

     To locate and select a primary contact, click the **Lookup** button .
   - **Account Number**

     You must enter 20 characters or less.

- **Parent Account**

  If the account that you are creating is a sub-account, then you must set up a relationship to its parent account. To locate and select a parent account, click the **Lookup** button .

  If the account that you are creating is a parent account, leave this field blank.

- **E-mail**

  E-mail addresses must be valid. For example, someone@example.com. Although this field is optional, including an e-mail address allows you to communicate with the account by using e-mail.

- **ZIP/Postal Code**

  Enter a code of 20 characters or fewer. Although this field is optional, including a ZIP Code or postal code can provide basic geographical information about the account that you can use in other areas of the application, such as reports and workflows.

4. In the **Details** section, observe any noted restrictions or requirements and enter all the information you have available in the following fields:

   - **Industry**

     Select an option from the list. This field can be customized, so the values will vary.

     If the account specifies an industry that is not in the list, you can ask your system administrator to add new industries to the list. This field is used in various reports such as **Account Overview**.

     The lead form also includes the industry field. If your system administrator adds custom industries to the account form, he or she should also add them to the lead form to keep the two lists synchronized.

   - **Annual Revenue**

     You must enter numbers between 0.00 and 1,000,000,000.00.

     You can use commas and a decimal point. You cannot use a currency symbol, such as the dollar ($), euro (€), or yen (¥).

   - **No. of Employees**

     You must enter a whole number between 0 and 1,000,000.

   - **SIC Code**

     Indicate the Standard Industrial Classification (SIC) code for this account. You can search on SIC for organizations with a particular code to display all accounts of businesses in that category. Enter a code of 20 characters or fewer.

   - **Ownership**

     Select an option that indicates how shares of the company are held. For example, if the company is held publicly, meaning its stock is traded on the open market, then its ownership is public.

   - **Ticker Symbol**

     If you enter a ticker symbol for a market outside the United States, you must prefix it with the country code, for example US:MSFT (*country code:ticker symbol*). This information is available only for markets that are currently listed on the MSN Money Web site. In addition to the United States (US), MSN Money also provides information for markets in Australia (AU), Belgium (BE), Canada (CA),

France (FR), Germany (DE), Italy (IT), Japan (JP), Netherlands (NL), Spain (ES), Sweden (SE), and the United Kingdom (UK). For more information, go to the *MSN Money Web site* (see MSN Money Web site - *http://go.microsoft.com/fwlink/?LinkId=95957*).

- **Territory**

  To locate and select a record, click the **Lookup** button .

  The Territory field can be customized, so the values will vary. If there are no territories in the list or the territory that you want is not listed, contact your system administrator and ask him or her to add the territory to the **Sales Territories** area, which is located in the **Settings** area.

- **Category**

  Select an option from the list. This field can be customized, so the values will vary.

  The default values are **Preferred Customer** and **Standard**. Your organization might add other values to manage territories.

  These values help determine how to set up territories so that your organization has roughly an equal number of highly rated accounts. The values might also reflect the priority of the account.

- **Relationship Type**

  Select an option from the list. This field can be customized, so the values will vary.

  Your organization might set up relationship roles, to indicate the role of your customers as they relate to your business. This field is not required.

  If there are no relationship roles in the list or the relationship role you want is not listed, contact your system administrator and ask them to add the relationship role to the **Relationship Roles** area, which is located in the **Settings** area.

- **Credit Limit**

  This field is not used as part of the business logic in Microsoft Dynamics CRM; however, your organization might use it as part of a workflow process.

- **Credit Hold**

  This field is not used as part of the business logic in Microsoft Dynamics CRM; however, your organization might use it as part of a workflow process.

- **Payment Terms**

  This field is mapped to any orders that are created for the record.

- **Price List**

  If your organization has price lists set up, you can click the **Lookup** button to search for and select the appropriate price list.

  This field is mapped to any orders that are created for the record.

5. Under **Information**, click **Notes and Activities**. In the Notes section, click **Add a new note**, and add the information that applies to your record.
6. In the **Preferences** section, enter information or observe any noted restrictions or requirements as needed:

- **Owner**

  This box is filled automatically with the name of the user who is creating the record. You can click the **Lookup** button to search for other records.

- **Contact Methods**

  - **Preferred**

    Select the option that best describes the preferred method of contact.

  - **E-mail**

    If you select **Allow**, Microsoft Dynamics CRM allows all e-mail, including e-mails related to campaign activities, to be sent to the e-mail address associated with the record. However, if you select **Do Not Allow**, Microsoft Dynamics CRM does not allow any e-mail to be sent to the e-mail address associated with the record.

  - **Bulk E-mail**

    If you select **Allow**, Microsoft Dynamics CRM allows any e-mail as part of a bulk e-mail process, including bulk e-mails related to campaign activities, to be sent to the e-mail address associated with the record. However, if you select **Do Not Allow**, Microsoft Dynamics CRM does not allow any bulk e-mail to be sent to the e-mail address associated with the record.

  - **Phone**

    The selected option simply provides information to anyone who views the record. This field is not used by Microsoft Dynamics CRM to control initiating or receiving phone calls.

  - **Fax**

    The selected option simply provides information to anyone who views the record.

  - **Mail**

    The selected option simply provides information to anyone who views the record. This field is not used by Microsoft Dynamics CRM to control initiating or receiving mail.

- **Marketing Information**

  - **Originating Lead**

    If this account was the result of converting a lead, then this field will automatically show the lead record. You can also enter the originating lead.

    To locate and select a lead, click the **Lookup** button .

  - **Send Marketing Materials**

    If you select **Send**, marketing material corresponding to campaigns is sent to the respective addresses (e-mail, physical address) for the record. This includes general marketing mailers that might be sent on a regular basis that are not part of a targeted marketing campaign. If you select **Do Not Send**, marketing materials are not sent, nor can activities related to sending marketing materials be created for the record.

  - **Last Date Included in Campaign**

Microsoft Dynamics CRM automatically sets the date for this field when any marketing communication is sent to the addresses for the record. You can also manually update this field and enter a date. This field is used as filter criteria in Marketing Automation. For example, the **Anti-Spam Setting** area of a Campaign form uses the date in this field to make sure that you do not send frequent mailers to a customer.

- **Service Preferences**

  Select the customer's preferred time and day for service activities.

  Click the **Lookup** button in the **Preferred Service**, **Preferred Facility/Equipment**, or **Preferred User** box to search for the appropriate record.

  Click the **Preferred Service**, **Preferred Facility/Equipment**, or **Preferred User** box to search for the appropriate record.

7. Click **Save** or **Save and Close**.

   Resolve potential duplicate records.

If the system detects that your record might be a potential duplicate, instead of saving the record, Microsoft Dynamics CRM displays the **Duplicates Detected** dialog box.

1. To open a record to make sure it is a potential duplicate, in the **Potential duplicate records** list, double-click the record.
   - If the duplicate-detection rule identified potential duplicate records in other record types, review records from each record type listed.
2. If your new or updated record is not a duplicate, to create the new record, click **Save Record**.

   - OR -

   If your new or updated record is a duplicate, to cancel your changes, click **Cancel**.

Notes

- If you enter a duplicate record within a few minutes of entering the first record, Microsoft Dynamics CRM will not detect the duplicate record. The matchcodes for new and updated records are created every five minutes, rather than as a record is created.
- Duplicate detection can take place only if duplicate detection is enabled in **Duplicate Detection Settings** and if at least one duplicate-detection rule exists for the record type. More information: *Avoiding Duplicate Records* (on page 69)

Tips

- You can add more addresses to handle various locations for a given account or contact. To do this, under **Common**, click **More Addresses**, and then in the **Records** group, click **Add New Address**.
- When the **Look Up Records** dialog box is open, if the record you need doesn't exist, click **New**, and create the record.
- If you create both accounts and subaccounts, and create relationships between them, then you can use the reporting features to get subtotals or total revenue reports for all the related accounts.

Related Topics

Work with Accounts 271
Manage Activities 23
Managing Accounts and Contacts 265
Requesting User Interface Changes 220

Associate an opportunity with an account or contact

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Sales Permissions

You associate opportunities with accounts or contacts by creating an opportunity relationship between them. The relationship you set up is based on your selection on the **Opportunity Relationship** form.

1. In the Navigation Pane, click **Sales**, and then click either **Accounts** or **Contacts**.
2. In the list of accounts or contacts, open the record to which you want to add an opportunity relationship.
3. Click the **Add** tab. In the **Create Relationship** group, click **Relationship**, and then click **Opportunity**.
4. On the **Opportunity Relationship** form, enter information in the following boxes:
   - **Opportunity**

     You must select the opportunity that you want to associate with the record. Click the **Lookup** button to search for an opportunity.
   - **Customer**

     Microsoft Dynamics CRM enters the account or contact record automatically.
   - **Customer Role**

     Select an option from the list. This field can be customized, so the values will vary.

     Your organization might set up relationship roles, to indicate the role of your customers as they relate to your business. This field is not required.

     If there are no relationship roles in the list or the relationship role you want is not listed, contact your system administrator and ask them to add the relationship role to the **Relationship Roles** area, which is located in the **Settings** area.
   - **Description**

     Use this field to provide additional information about the relationship.
5. Click **Save** or **Save and Close**.
6. Click the **Account** or **Contact** tab. Click **Save** or **Save and Close**.

Note
You cannot set up duplicate relationships between a customer record and an opportunity. For example, if you create a relationship between an account and the opportunity, and the customer's relationship role is set to Distributor, you cannot create a new relationship for the account that uses the same customer opportunity and relationship role.

Related Topics

Work with Contacts 276
Work with Accounts 271
Work with Opportunities 310
Managing Opportunities 310
Requesting User Interface Changes 220

Use the Closed Activity list

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Sales Permissions

Many record types allow for activities to be associated with them. For example, an opportunity might have an associated phone call activity. When you close any associated activity as completed, that activity shows up in the record history of the associated record. To view the record history, in the record, under **Common**, click **Closed Activities**.

You can do the following in the **Closed Activities** list:

- While the record is in draft form, you can create a new activity for this record by clicking the **New Activity** button. You can no longer do this when the record is activated. Note that even though you create this activity from the **Closed Activities** list, it will be displayed in the **Activities** list while it is active. It will be displayed in the **Closed Activities** list after you set the status to completed.
- You can also do standard tasks such as printing, exporting data, running a report, or assigning. For information about doing those tasks, see the topic What else can I do? More tasks...

The **Closed Activities** list for opportunities, accounts, and contacts includes two lists that help you narrow down the number of completed activities:

- To narrow down the list to a certain time period, such as Last 30 days, click **Filter on**.
- To see completed activities for one particular record, click **Include**, and then select **This Record Only**.
- To create a list of activities that are related to any record associated with the account or contact, select **Related Regarding Records**.

Related Topics

Manage Activities 23

Set customer preferences for a service activity

Can I do this task?

This task requires permissions that are found in all default service scheduling security roles.More information about specific permissions and performing this task while offline: Service Scheduling Permissions

You can provide personalized customer service for your customers by recording their preferences regarding services and service times. These preferences become the default criteria the next time that a service activity is scheduled for the customer and shown in the **Form Assistant** pane.

1. In the Navigation Pane, click **Workplace**, and then under **Customers**, click either **Accounts** or **Contacts**.
2. In the list, double-click a record.
3. Under **Information**, click **Common**.
4. Under **Service Preferences**, click the customer's preferred time and day for appointments from the lists.
5. Click the **Preferred Service**, **Preferred Facility/Equipment**, or **Preferred User** box to search for the this information. You can click the **Lookup** button to search for and select records.
6. Click **Save** or **Save and Close**.

Related Topics

Work with Contacts 276
Work with Accounts 271
Navigating the Service Calendar 427

Add or remove a customer record in a marketing list

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Sales Permissions

You can add a customer record, such as a lead, account, or contact, to a marketing list. If a customer record is added to a marketing list from another area within Microsoft Dynamics CRM, the customer record is updated to reflect this association. Therefore, if you want to add a customer record, such as a lead, to a marketing list, you might find that the lead is already associated with the list.

1. In the Navigation Pane, click **Sales**, and then click **Leads**, **Accounts**, or **Contacts** depending on which type of record you want to add to a marketing list.
2. In the list, open the record that you want to add to a marketing list.
3. In the **Collaborate** group, click **Add to Marketing List**.
4. In the **Look Up Record** dialog box, locate and select the marketing list you want to add the record to, and then click **OK**.
5. Click **Save** or **Save and Close**.

Note
To remove a record from a marketing list, open the customer record you want to remove from the marketing list. In the Navigation Pane, under **Marketing**, click **Marketing Lists**. Select the marketing list that you want to remove, and then, in the **Records** group, click **Remove**. In the confirmation message, click **OK**.

Tip
If you cannot locate the marketing list you want to add, you might need to create it. To do this, in the **Look Up Records** dialog box, click **New** and then complete the form.

Related Topics

Work with Contacts 276
Work with Accounts 271
Managing Accounts and Contacts 265
Work with Leads 299
Managing Leads 289
Work with Marketing Lists 389

View associated campaigns from customer records

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Sales Permissions

You can view a list of campaigns for a customer from within the Customer Record form. When a customer record is added to a marketing list and that marketing list is added to a campaign, the customer record is updated to reflect this association.

1. In the Navigation Pane, click **Sales**, and then click **Leads**, **Accounts**, or **Contacts**, depending on which type of record you want to view associated campaigns for.
2. In the list, open the record that you want to view.
3. Under **Marketing**, click **Campaigns** to see the list of campaigns the customer is included in.

Related Topics

Work with Contacts 276
Work with Leads 299
Managing Leads 289
Work with Accounts 271
Managing Accounts and Contacts 265
Work with Campaigns and Campaign Templates 375

Customer Relationship Form

Use the **Customer Relationship** form to specify the type of relationship between accounts and contacts and the relationship role that they have relative to each other; that is, how they affect, influence, or contribute to each other.

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Sales Permissions

In Microsoft Dynamics CRM, you can create relationships between one customer record and one or more other records. These relationships are defined by their relationship role. The relationship that you set up is based on your selection on the **Customer Relationship** form.

1. In the Navigation Pane, click **Sales**, and then click either **Accounts** or **Contacts**.
2. In the list of accounts or contacts, open the record that you want.
3. In the record, click the **Add** tab.
4. In the **Create Relationship** group, click **Relationship**, and then select, **Customer Relationship**.
5. On the **Customer Relationship** form, enter information in the following boxes:
   - **Party 1**

     This field automatically displays the name of the customer whose record you opened.

   - However, you can click the **Lookup** button to search for and select a different account or contact record. If you do so, the new relationship that you set up will not appear in the customer record that you originally opened.
   - **Party 2**

     Select the customer record that you want to associate with the **Party 1** record. Click the **Lookup** button to search for an account or contact record.

   - **Role 1**

Select an option from the list. This field can be customized, so the values will vary.

Your organization might set up relationship roles, to indicate the role of your customers as they relate to your business. This field is not required.

If there are no relationship roles in the list or the relationship role you want is not listed, contact your system administrator and ask them to add the relationship role to the **Relationship Roles** area, which is located in the **Settings** area.

- **Description 1**

  Use this field to provide additional information about the relationship.

- **Role 2**

  In the list, click the relationship role that best describes the relationship of **Party 1** to **Party 2**. The same items will appear in the list for Role 1 and Role 2.

  For example, if you selected **Supplier** from **Role 1**, you might select **Retailer** from **Role 2**.

- **Description 2**

  Use this field to provide additional information about the relationship.

6. Click **Save** or **Save and Close**.
7. Close the account or contact record.

Important
You cannot create duplicate relationships between records. For example, if there is already a relationship between the account Fabrikam, Inc, with the role of distributor, and the account, Litware, Inc, with the role of seller, you cannot create the same relationship between the records.

Note
To remove a relationship, open the account or contact, and then in the Navigation Pane, under **Common**, click **Relationships**. In the list of relationships, select the relationship that you want to delete, and then on the Actions toolbar, click the **Delete** button ✕. Deleting the relationship does not delete the customer records.

Related Topics

Work with Contacts 276
Managing Accounts and Contacts 265
Work with Accounts 271

Deactivate or activate an account or contact

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Sales Permissions

Instead of deleting an account or contact, you can deactivate it and still have an audit trail for your sales process. When an account or contact is deactivated, it cannot be edited, and relationships between the account or contact and other records cannot be created.

The only way to view a deactivated account or contact is to select **Inactive Accounts** or **Inactive Contacts** in the **View** list. If the representative of the account or the individual contact for the record that you deactivated contacts you in the future, you have the option of reactivating the account or contact without reentering all the data.

1. In the Navigation Pane, click **Sales**, and then click either **Accounts** or **Contacts**.
2. Select the accounts or contacts that you want to deactivate or activate.
3. In the **Records** group, click **Deactivate**.

   - OR -

   - In the **Records** group, click **Activate**.
4. In the confirmation dialog box, click **OK**.

Note
When you deactivate a record, all relationships created while it was active continue to be available; however, you cannot create new relationships with a deactivated record.

Related Topics

Work with Contacts 276
Work with Accounts 271
Managing Accounts and Contacts 265

Create a quick campaign

Can I do this task?

This task requires permissions that are found in all default marketing security roles. More information about specific permissions and performing this task while offline: Marketing Permissions

You can use quick campaigns to create one type of activity for many accounts, contacts, or leads at once.

1. Select the records or list that you want to run a quick campaign on, and then start the Create Quick Campaign Wizard.

   From a list of records, including the results of a search

   You can run a quick campaign from any list of accounts, contacts, or leads.

   c. Select the record or records for which you want to create a quick campaign. If you want to include all records on the current page or all records on all pages, then skip this step.

   d. On the Actions toolbar, click **Create Quick Campaign** , and then click one of the following:

- **For Selected Records**

  Select this option if you have selected one or more records in the list.

- **For All Records on Current Page**

  Select this option to include all records on the page for the quick campaign activity.

- **For All Records on All Pages**

  Select this option to include all records on all pages for the quick campaign activity.

From the Marketing Lists list

You can run a quick campaign on one or more marketing lists in the **Marketing Lists** list.

a. In the Navigation Pane, click **Marketing** or **Sales**, and then click **Marketing Lists**.

b. Select the marketing list or marketing lists for which you want to create a quick campaign.

c. On the Actions toolbar, click **Create Quick Campaign**, and then click **For Selected Records**.

From a marketing list

You can run a quick campaign on the accounts, contacts, or leads in any marketing list.

a. In the Navigation Pane, click **Marketing** or **Sales**, and then click **Marketing Lists**.

b. Double-click the marketing list for which you want to create a quick campaign.

c. On the Actions toolbar, click **Create Quick Campaign**.

2. In the Create Quick Campaign Wizard, follow the instructions to create the quick campaign.

Notes

- You cannot add additional records to a quick campaign after you have created it.
- In the Create Quick Campaign Wizard, you can select who you want Microsoft Dynamics CRM to assign the activity to and whether Microsoft Dynamics CRM should perform the activity automatically for appropriate activities (such as sending e-mail messages). For example, if you are creating a phone call activity for all of the sales representatives, you can select the phone call activity, and then select **The owners of the records that are included in the quick campaign**. Each sales representative can then see the activity and take action on it. However, if you are creating a large number of e-mail activities that Microsoft Dynamics CRM will perform automatically, you can assign the e-mail activity to yourself instead of the record owners.
- Whether or not some activities are performed automatically depends on an option available to users who have the Organization Settings Write privilege. More information: Manage System Settings

Related Topics

Work with Quick Campaigns 382

Creating and Managing Marketing Lists 387

Planning Campaigns 375

Understanding Quick Campaigns 382

Default sales reports

The following sales reports are available:

This topic shows you how to use the different reports. To find more information, when you generate a report, click **Help**, and then click **Help on This Page**.

- *Account Distribution Report* (on page **Error! Bookmark not defined.**)

  Use this report to identify patterns in your top revenue-generating accounts using two charts. The earned revenue chart displays the earned revenue grouped by a market facet, such as product, territory, or industry. The accounts count chart displays the amount of earned revenue using the same grouping as the earned revenue chart.

- *Account Overview Report* (on page 99)

  Use this report to obtain a one-page overview of everything occurring with an account. The report displays a profile of the account, contact information, and summaries of opportunities and case activities.

- *Account Summary Report* (on page 100)

  Use this report to determine historically what has occurred with an account. This report also displays what is scheduled to occur in the future. The report displays a chronological summary for an account, including sales and service activities, notes, and records.

- *Activities Report* (on page 101)

  Use this report to identify patterns in activities. Activities can be grouped by owner or activity type, or by the record the activity is regarding.

- *Competitor Win Loss Report* (on page 101)

  Use this report to compare how your sales team performs against your competitors. The report displays a list of competitors, with data on open, closed, won, and lost opportunities for each.

- *Invoices Report* (on page 102)

  Use this report to print invoices.

- Invoice Status Report

  Use this report to view your accounts receivable. The chart displays the number of invoices grouped by status with the total amount of invoices in each status.

- *Lead Source Effectiveness Report* (on page 103)

  Use this report to compare how effective your lead sources are at generating quality opportunities. The report lists the percentage of qualified leads, and leads that generate revenue for each lead category.

- *Neglected Accounts Report* (on page 107)

  Use this report to identify accounts that have not been contacted recently. The report displays a chart with accounts that have had no activities completed in a specified number of days.

- *Neglected Leads Report* (on page 104)

  Use this report to identify any leads that have not been contacted. The report displays a chart of leads that have had no associated activities or notes during a specified time period.

- *Orders Report* (on page 104)

Use this report to print orders.

- *Products by Account Report* (on page 108)

  Use this report to see which products are used by an account. For each account, the report lists the associated products.

- *Products by Contact Report* (on page 109)

  Use this report to see which products are used by a contact. For each contact, the report lists the associated products.

- Progress Against Goals Report
- Use this report to view the sales progress against the primary and subordinate goals. This report displays a chart with the target values and the actual values of the goals.
- *Quotes Report* (on page 105)

  Use this report to print quotes.

- *Sales History Report* (on page 106)

  Use this report to view a history of sales performance by sales representative. The report displays a chart of both lost and earned revenue. The report uses data only from the closed opportunities, and calculates the earned revenue from Won opportunities and the lost revenue from the lost opportunities.

- *Sales Pipeline Report* (on page 106)

  Use this report to see anticipated potential sales. The report displays a chart of potential sales grouped by user, sales territory, customer territory, date, products, rating, or sales stage.

If the default reports don't provide the information you need, try creating an Advanced Find search, and exporting the results to Microsoft Office Excel.

Note
This topic documents the list of default reports as they were shipped. If this list differs from the reports that are available to you, contact your report administrator or system administrator for information about the customized reports.

Related Topics

Work with Opportunities 310
Work with Leads 299
Work with Contacts 276
Work with Accounts 271

Work with Contacts

Contacts are people who represent customers or potential customers, or someone related to an account. You can bulk add Microsoft Office Outlook contacts into Microsoft Dynamics CRM with the Add Contacts Wizard. More information: *Resource Center* (see Resource Center - http://go.microsoft.com/fwlink/?LinkId=208670).

Create or edit a contact

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Sales Permissions

1. In the Navigation Pane, click **Sales**, and then click **Contacts**.
2. In the **Records** group, click **New**, or open the record that you want to edit.
3. In the **General** section, enter or edit information or observe any noted restrictions or requirements as needed:
   - **First Name**

     Enter a first name between 1 and 50 characters.You can use accent marks when you enter data, for example, in a customer's name. Your ability to sort and find information is not affected by these accent marks.
   - **Last Name**

     Enter a name between 1 and 50 characters.
   - **Parent Customer**

     If the contact record that you are creating is a subcontact, you can specify its parent contact or customer record. To locate and select a parent customer, click the **Lookup** button .

     If the contact that you are creating is a parent customer, leave this field blank.
   - **E-mail**

     E-mail addresses must be valid. For example, someone@example.com.
   - **ZIP/Postal Code**

     Enter a code of 20 characters or fewer.
4. In the **Details** section, observe any noted restrictions or requirements and enter all the information you have available in the following fields:
   - **Birthday**

     You must enter the date in the format your organization has set for dates. For example, 01/01/2006 or 31.12.2005.

     If you omit leading zeros in a date, Microsoft Dynamics CRM will add them automatically. For example, when you type 1/1/06, Microsoft Dynamics CRM will display it as 01/01/2006, if that is the date format of your organization.
   - **Anniversary**

     You must enter the date in the format your organization has set for dates. For example, 01/01/2006 or 31.12.2005.

If you omit leading zeros in a date, Microsoft Dynamics CRM will add them automatically. For example, when you type 1/1/06, Microsoft Dynamics CRM will display it as 01/01/2006, if that is the date format of your organization.

5. Under **Information**, click **Notes and Activities**. In the Notes section, click **Add a new note**, and add the information that applies to your record.
6. In the **Preferences** section, enter information or observe any noted restrictions or requirements as needed:

- **Owner**

  This box is filled automatically with the name of the user who is creating the record. You can click the **Lookup** button to search for other records.

- **Credit Limit**

  This field is not used as part of the business logic in Microsoft Dynamics CRM; however, your organization might use it as part of a workflow process.

- **Credit Hold**

  This field is not used as part of the business logic in Microsoft Dynamics CRM; however, your organization might use it as part of a workflow process.

- **Payment Terms**

  This field is mapped to any orders that are created for the record.

- **Price List**

  If your organization has price lists set up, you can click the **Lookup** button to search for and select the appropriate price list. This field is mapped to any orders that are created for the record.

- **Contact Methods**

  - **Preferred**

    Select the option that best describes the preferred method of contact.

  - **E-mail**

    If you select **Allow**, Microsoft Dynamics CRM allows all e-mail, including e-mails related to campaign activities, to be sent to the e-mail address associated with the record. However, if you select **Do Not Allow**, Microsoft Dynamics CRM does not allow any e-mail to be sent to the e-mail address associated with the record.

  - **Bulk E-mail**

    If you select **Allow**, Microsoft Dynamics CRM allows any e-mail as part of a bulk e-mail process, including bulk e-mails related to campaign activities, to be sent to the e-mail address associated with the record. However, if you select **Do Not Allow**, Microsoft Dynamics CRM does not allow any bulk e-mail to be sent to the e-mail address associated with the record.

  - **Phone**

    The selected option simply provides information to anyone who views the record. This field is not used by Microsoft Dynamics CRM to control initiating or receiving phone calls.

- **Fax**

  The selected option simply provides information to anyone who views the record.

- **Mail**

  The selected option simply provides information to anyone who views the record. This field is not used by Microsoft Dynamics CRM to control initiating or receiving mail.

- **Marketing Information**

  - **Originating Lead**

    If this contact was the result of converting a lead, then this field will automatically show the lead record. You can also enter the originating lead. To locate and select a lead, click the **Lookup** button .

  - **Send Marketing Materials**

    If you select **Send**, marketing material corresponding to campaigns is sent to the respective addresses (e-mail, physical address) for the record. This includes general marketing mailers that might be sent on a regular basis that are not part of a targeted marketing campaign. If you select **Do Not Send**, marketing materials are not sent, nor can activities related to sending marketing materials be created for the record.

  - **Last Date Included in Campaign**

    Microsoft Dynamics CRM automatically sets the date for this field when any marketing communication is sent to the addresses for the record. You can also manually update this field and enter a date. This field is used as filter criteria in Marketing Automation. For example, the **Anti-Spam Setting** area of a Campaign form uses the date in this field to make sure that you do not send frequent mailers to a customer.

- **Service Preferences**

  Select the customer's preferred time and day for service activities.

  Click the **Lookup** button in the **Preferred Service**, **Preferred Facility/Equipment**, or **Preferred User** box to search for the appropriate record.

7. Click **Save** or **Save and Close**.

   Resolve potential duplicate records.

If the system detects that your record might be a potential duplicate, instead of saving the record, Microsoft Dynamics CRM displays the **Duplicates Detected** dialog box.

1. To open a record to make sure it is a potential duplicate, in the **Potential duplicate records** list, double-click the record.

   - If the duplicate-detection rule identified potential duplicate records in other record types, review records from each record type listed.

2. If your new or updated record is not a duplicate, to create the new record, click **Save Record**.

   - OR -

   If your new or updated record is a duplicate, to cancel your changes, click **Cancel**.

Notes

- If you enter a duplicate record within a few minutes of entering the first record, Microsoft Dynamics CRM will not detect the duplicate record. The matchcodes for new and updated records are created every five minutes, rather than as a record is created.
- Duplicate detection can take place only if duplicate detection is enabled in **Duplicate Detection Settings** and if at least one duplicate-detection rule exists for the record type. More information: *Avoiding Duplicate Records* (on page 69)

Note

You can associate multiple contacts with an account, but only one contact can be the primary contact for an account. If you consolidate contacts and subcontacts, you can create relationships between them and use the reporting features to generate revenue reports for all the related contacts.

-

Related Topics

Work with Contacts 276
Manage Activities 23
Create Customer-Ready Documents and Messages 164
Requesting User Interface Changes 220

Associate an opportunity with an account or contact

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Sales Permissions

You associate opportunities with accounts or contacts by creating an opportunity relationship between them. The relationship you set up is based on your selection on the **Opportunity Relationship** form.

1. In the Navigation Pane, click **Sales**, and then click either **Accounts** or **Contacts**.
2. In the list of accounts or contacts, open the record to which you want to add an opportunity relationship.
3. Click the **Add** tab. In the **Create Relationship** group, click **Relationship**, and then click **Opportunity**.
4. On the **Opportunity Relationship** form, enter information in the following boxes:
   - **Opportunity**

     You must select the opportunity that you want to associate with the record. Click the **Lookup** button to search for an opportunity.
   - **Customer**

     Microsoft Dynamics CRM enters the account or contact record automatically.
   - **Customer Role**

Select an option from the list. This field can be customized, so the values will vary.

Your organization might set up relationship roles, to indicate the role of your customers as they relate to your business. This field is not required.

If there are no relationship roles in the list or the relationship role you want is not listed, contact your system administrator and ask them to add the relationship role to the **Relationship Roles** area, which is located in the **Settings** area.

- **Description**

  Use this field to provide additional information about the relationship.

5. Click **Save** or **Save and Close**.
6. Click the **Account** or **Contact** tab. Click **Save** or **Save and Close**.

Note
You cannot set up duplicate relationships between a customer record and an opportunity. For example, if you create a relationship between an account and the opportunity, and the customer's relationship role is set to Distributor, you cannot create a new relationship for the account that uses the same customer opportunity and relationship role.

Related Topics

Work with Contacts 276
Work with Accounts 271
Work with Opportunities 310
Managing Opportunities 310
Requesting User Interface Changes 220

Use the Closed Activity list

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Sales Permissions

Many record types allow for activities to be associated with them. For example, an opportunity might have an associated phone call activity. When you close any associated activity as completed, that activity shows up in the record history of the associated record. To view the record history, in the record, under **Common**, click **Closed Activities**.

You can do the following in the **Closed Activities** list:

- While the record is in draft form, you can create a new activity for this record by clicking the **New Activity** button. You can no longer do this when the record is activated. Note that even though you create this activity from the **Closed Activities** list, it will be displayed in the **Activities** list while it is active. It will be displayed in the **Closed Activities** list after you set the status to completed.

- You can also do standard tasks such as printing, exporting data, running a report, or assigning. For information about doing those tasks, see the topic What else can I do? More tasks...

The **Closed Activities** list for opportunities, accounts, and contacts includes two lists that help you narrow down the number of completed activities:

- To narrow down the list to a certain time period, such as Last 30 days, click **Filter on**.
- To see completed activities for one particular record, click **Include**, and then select **This Record Only**.
- To create a list of activities that are related to any record associated with the account or contact, select **Related Regarding Records**.

Related Topics

Manage Activities 23

Set customer preferences for a service activity

Can I do this task?

This task requires permissions that are found in all default service scheduling security roles.More information about specific permissions and performing this task while offline: Service Scheduling Permissions

You can provide personalized customer service for your customers by recording their preferences regarding services and service times. These preferences become the default criteria the next time that a service activity is scheduled for the customer and shown in the **Form Assistant** pane.

1. In the Navigation Pane, click **Workplace**, and then under **Customers**, click either **Accounts** or **Contacts**.
2. In the list, double-click a record.
3. Under **Information**, click **Common**.
4. Under **Service Preferences**, click the customer's preferred time and day for appointments from the lists.
5. Click the **Preferred Service**, **Preferred Facility/Equipment**, or **Preferred User** box to search for the this information. You can click the **Lookup** button to search for and select records.
6. Click **Save** or **Save and Close**.

Related Topics

Work with Contacts 276
Work with Accounts 271
Navigating the Service Calendar 427

Add or remove a customer record in a marketing list

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Sales Permissions

You can add a customer record, such as a lead, account, or contact, to a marketing list. If a customer record is added to a marketing list from another area within Microsoft Dynamics CRM, the customer record is updated to reflect this association. Therefore, if you want to add a customer record, such as a lead, to a marketing list, you might find that the lead is already associated with the list.

1. In the Navigation Pane, click **Sales**, and then click **Leads**, **Accounts**, or **Contacts** depending on which type of record you want to add to a marketing list.
2. In the list, open the record that you want to add to a marketing list.
3. In the **Collaborate** group, click **Add to Marketing List**.
4. In the **Look Up Record** dialog box, locate and select the marketing list you want to add the record to, and then click **OK**.
5. Click **Save** or **Save and Close**.

Note
To remove a record from a marketing list, open the customer record you want to remove from the marketing list. In the Navigation Pane, under **Marketing**, click **Marketing Lists**. Select the marketing list that you want to remove, and then, in the **Records** group, click **Remove**. In the confirmation message, click **OK**.

Tip
If you cannot locate the marketing list you want to add, you might need to create it. To do this, in the **Look Up Records** dialog box, click **New** and then complete the form.

Related Topics

Work with Contacts 276
Work with Accounts 271
Managing Accounts and Contacts 265
Work with Leads 299
Managing Leads 289
Work with Marketing Lists 389

View associated campaigns from customer records

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Sales Permissions

You can view a list of campaigns for a customer from within the Customer Record form. When a customer record is added to a marketing list and that marketing list is added to a campaign, the customer record is updated to reflect this association.

1. In the Navigation Pane, click **Sales**, and then click **Leads**, **Accounts**, or **Contacts**, depending on which type of record you want to view associated campaigns for.
2. In the list, open the record that you want to view.
3. Under **Marketing**, click **Campaigns** to see the list of campaigns the customer is included in.

Related Topics

Work with Contacts 276
Work with Leads 299
Managing Leads 289
Work with Accounts 271
Managing Accounts and Contacts 265
Work with Campaigns and Campaign Templates 375

Customer Relationship Form

Use the **Customer Relationship** form to specify the type of relationship between accounts and contacts and the relationship role that they have relative to each other; that is, how they affect, influence, or contribute to each other.

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Sales Permissions

In Microsoft Dynamics CRM, you can create relationships between one customer record and one or more other records. These relationships are defined by their relationship role. The relationship that you set up is based on your selection on the **Customer Relationship** form.

1. In the Navigation Pane, click **Sales**, and then click either **Accounts** or **Contacts**.
2. In the list of accounts or contacts, open the record that you want.
3. In the record, click the **Add** tab.
4. In the **Create Relationship** group, click **Relationship**, and then select, **Customer Relationship**.
5. On the **Customer Relationship** form, enter information in the following boxes:

   - **Party 1**

     This field automatically displays the name of the customer whose record you opened.

- However, you can click the **Lookup** button to search for and select a different account or contact record. If you do so, the new relationship that you set up will not appear in the customer record that you originally opened.
- **Party 2**

  Select the customer record that you want to associate with the **Party 1** record. Click the **Lookup** button to search for an account or contact record.

- **Role 1**

  Select an option from the list. This field can be customized, so the values will vary.

  Your organization might set up relationship roles, to indicate the role of your customers as they relate to your business. This field is not required.

  If there are no relationship roles in the list or the relationship role you want is not listed, contact your system administrator and ask them to add the relationship role to the **Relationship Roles** area, which is located in the **Settings** area.
- **Description 1**

  Use this field to provide additional information about the relationship.
- **Role 2**

  In the list, click the relationship role that best describes the relationship of **Party 1** to **Party 2**. The same items will appear in the list for Role 1 and Role 2.

  For example, if you selected **Supplier** from **Role 1**, you might select **Retailer** from **Role 2**.
- **Description 2**

  Use this field to provide additional information about the relationship.

6. Click **Save** or **Save and Close**.
7. Close the account or contact record.

Important
You cannot create duplicate relationships between records. For example, if there is already a relationship between the account Fabrikam, Inc, with the role of distributor, and the account, Litware, Inc, with the role of seller, you cannot create the same relationship between the records.

Note
To remove a relationship, open the account or contact, and then in the Navigation Pane, under **Common**, click **Relationships**. In the list of relationships, select the relationship that you want to delete, and then on the Actions toolbar, click the **Delete** button . Deleting the relationship does not delete the customer records.

Related Topics

Work with Contacts 276
Managing Accounts and Contacts 265
Work with Accounts 271

Deactivate or activate an account or contact

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Sales Permissions

Instead of deleting an account or contact, you can deactivate it and still have an audit trail for your sales process. When an account or contact is deactivated, it cannot be edited, and relationships between the account or contact and other records cannot be created.

The only way to view a deactivated account or contact is to select **Inactive Accounts** or **Inactive Contacts** in the **View** list. If the representative of the account or the individual contact for the record that you deactivated contacts you in the future, you have the option of reactivating the account or contact without reentering all the data.

1. In the Navigation Pane, click **Sales**, and then click either **Accounts** or **Contacts**.
2. Select the accounts or contacts that you want to deactivate or activate.
3. In the **Records** group, click **Deactivate**.

   - OR -

   - In the **Records** group, click **Activate**.
4. In the confirmation dialog box, click **OK**.

Note

When you deactivate a record, all relationships created while it was active continue to be available; however, you cannot create new relationships with a deactivated record.

Related Topics

Work with Contacts 276
Work with Accounts 271
Managing Accounts and Contacts 265

Can I do this task?

This task requires permissions that are found in all default marketing security roles. More information about specific permissions and performing this task while offline: Marketing Permissions

You can use quick campaigns to create one type of activity for many accounts, contacts, or leads at once.

1. Select the records or list that you want to run a quick campaign on, and then start the Create Quick Campaign Wizard.

   From a list of records, including the results of a search

   You can run a quick campaign from any list of accounts, contacts, or leads.

   a. Select the record or records for which you want to create a quick campaign. If you want to include all records on the current page or all records on all pages, then skip this step.

   b. On the Actions toolbar, click **Create Quick Campaign** , and then click one of the following:

      - **For Selected Records**

        Select this option if you have selected one or more records in the list.

      - **For All Records on Current Page**

        Select this option to include all records on the page for the quick campaign activity.

      - **For All Records on All Pages**

        Select this option to include all records on all pages for the quick campaign activity.

   From the Marketing Lists list

   You can run a quick campaign on one or more marketing lists in the **Marketing Lists** list.

   a. In the Navigation Pane, click **Marketing** or **Sales**, and then click **Marketing Lists**.

   b. Select the marketing list or marketing lists for which you want to create a quick campaign.

   c. On the Actions toolbar, click **Create Quick Campaign**, and then click **For Selected Records**.

   From a marketing list

   You can run a quick campaign on the accounts, contacts, or leads in any marketing list.

   a. In the Navigation Pane, click **Marketing** or **Sales**, and then click **Marketing Lists**.

   b. Double-click the marketing list for which you want to create a quick campaign.

   c. On the Actions toolbar, click **Create Quick Campaign**.

2. In the Create Quick Campaign Wizard, follow the instructions to create the quick campaign.

   Notes

   - You cannot add additional records to a quick campaign after you have created it.
   - In the Create Quick Campaign Wizard, you can select who you want Microsoft Dynamics CRM to assign the activity to and whether Microsoft Dynamics CRM should perform the activity automatically for appropriate activities (such as sending e-mail messages). For example, if you are creating a phone call activity for all of the sales representatives, you can select the phone call activity, and then select **The owners of the records that are included in the quick campaign**. Each sales representative can then see the activity and take action on it. However, if you are creating a large number of e-mail activities that Microsoft Dynamics CRM will perform automatically, you can assign the e-mail activity to yourself instead of the record owners.

- Whether or not some activities are performed automatically depends on an option available to users who have the Organization Settings Write privilege. More information: Manage System Settings

Related Topics

Work with Quick Campaigns 382
Creating and Managing Marketing Lists 387
Planning Campaigns 375
Understanding Quick Campaigns 382

Default sales reports

The following sales reports are available:

This topic shows you how to use the different reports. To find more information, when you generate a report, click **Help**, and then click **Help on This Page**.

- *Account Distribution Report* (on page **Error! Bookmark not defined.**)

  Use this report to identify patterns in your top revenue-generating accounts using two charts. The earned revenue chart displays the earned revenue grouped by a market facet, such as product, territory, or industry. The accounts count chart displays the amount of earned revenue using the same grouping as the earned revenue chart.

- *Account Overview Report* (on page 99)

  Use this report to obtain a one-page overview of everything occurring with an account. The report displays a profile of the account, contact information, and summaries of opportunities and case activities.

- *Account Summary Report* (on page 100)

  Use this report to determine historically what has occurred with an account. This report also displays what is scheduled to occur in the future. The report displays a chronological summary for an account, including sales and service activities, notes, and records.

- *Activities Report* (on page 101)

  Use this report to identify patterns in activities. Activities can be grouped by owner or activity type, or by the record the activity is regarding.

- *Competitor Win Loss Report* (on page 101)

  Use this report to compare how your sales team performs against your competitors. The report displays a list of competitors, with data on open, closed, won, and lost opportunities for each.

- *Invoices Report* (on page 102)

  Use this report to print invoices.

- Invoice Status Report

  Use this report to view your accounts receivable. The chart displays the number of invoices grouped by status with the total amount of invoices in each status.

- *Lead Source Effectiveness Report* (on page 103)

  Use this report to compare how effective your lead sources are at generating quality opportunities. The report lists the percentage of qualified leads, and leads that generate revenue for each lead category.

- *Neglected Accounts Report* (on page 107)

  Use this report to identify accounts that have not been contacted recently. The report displays a chart with accounts that have had no activities completed in a specified number of days.

- *Neglected Leads Report* (on page 104)

  Use this report to identify any leads that have not been contacted. The report displays a chart of leads that have had no associated activities or notes during a specified time period.

- *Orders Report* (on page 104)

  Use this report to print orders.

- *Products by Account Report* (on page 108)

  Use this report to see which products are used by an account. For each account, the report lists the associated products.

- *Products by Contact Report* (on page 109)

  Use this report to see which products are used by a contact. For each contact, the report lists the associated products.

- Progress Against Goals Report
- Use this report to view the sales progress against the primary and subordinate goals. This report displays a chart with the target values and the actual values of the goals.

- *Quotes Report* (on page 105)

  Use this report to print quotes.

- *Sales History Report* (on page 106)

  Use this report to view a history of sales performance by sales representative. The report displays a chart of both lost and earned revenue. The report uses data only from the closed opportunities, and calculates the earned revenue from Won opportunities and the lost revenue from the lost opportunities.

- *Sales Pipeline Report* (on page 106)

  Use this report to see anticipated potential sales. The report displays a chart of potential sales grouped by user, sales territory, customer territory, date, products, rating, or sales stage.

If the default reports don't provide the information you need, try creating an Advanced Find search, and exporting the results to Microsoft Office Excel.

Note
This topic documents the list of default reports as they were shipped. If this list differs from the reports that are available to you, contact your report administrator or system administrator for information about the customized reports.

Related Topics

Work with Opportunities 310
Work with Leads 299
Work with Contacts 276
Work with Accounts 271

Managing Leads

In Microsoft Dynamics CRM, you can get lead information in the Sales area. All activities are logged and a running history of every activity with the lead is kept, once it is completed.

You can enter leads individually. In addition, you can use Microsoft Dynamics CRM to import lead lists into the database, perform the common qualifying activities, and convert leads to opportunities, if they qualify.

Each disqualified lead is retained in the database for business-reporting purposes.

You can track information about prospective customers, and then qualify and assign inquiries. Because leads are tracked separately from customers throughout the sales cycle, you can focus on building your customer base.

Understanding How Accounts, Contacts, Leads, and Opportunities Relate

Account and contact records represent established customers. Leads are potential or prospective customers. Opportunities are not a specific customer, such as a lead, contact, or account, and therefore require a customer record to be added to the opportunity.

Work with Leads

Leads represent potential customers who have not yet been qualified by your sales process. As you qualify leads, you can convert them to other types of records.

Create or edit a lead

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Sales Permissions

When you create a lead, you might be tempted to only enter the system-required fields (marked with asterisks **Business-required** symbol *) or business-recommended fields (marked with plus signs **Business-recommended** symbol +); however, the more data you collect and enter into this form, the more likely you are to turn those leads into business opportunities. Remember that e-mail addresses, the source of

the lead, and specific product interests are key factors in helping your sales staff complete the necessary follow-up.

1. In the Navigation Pane, click **Sales**, and then click **Leads**.
2. In the **Records** group, click **New**, or open the record that you want to edit.
3. In the **General** section, enter or edit information or observe any noted restrictions or requirements as needed:
   - **Topic**

     This information should reflect what the lead is interested in. For example, if a potential customer calls and asks for details on a product, list the name of the product here.
   - **First Name**

     Enter a first name between 1 and 50 characters. You can use accent marks when you enter data, for example, in a customer's name. Your ability to sort and find information is not affected by these accent marks.
   - **Last Name**

     Enter a name between 1 and 50 characters.
   - **Company Name**

     You must enter a name with a length of 100 characters or fewer.
   - Enter all the contact information you have available for this lead because this information will assist a salesperson in making future contacts. E-mail addresses must be valid. For example, someone@example.com.
   - **Address**
   - Enter the address of the lead.
     - **ZIP/Postal Code**

       Enter a code of 20 characters or fewer.
4. In the **Common** section, enter all the information you have available in the following sections:
   - **Lead Information**

     It is very important to provide the lead source information so that you can determine which marketing method, such as advertisement or trade shows, generates the most leads for your organization. If you specify lead information, you can filter on **Lead Source** to determine how many leads were generated by a given method.
   - **Company Information**
     - **Industry**

       If the lead specifies an industry that is not in the list, you can work with your system administrator to get new industries added to the list because this field is customizable. This field is used in various reports such as Lead Source Effectiveness; which, if used with filtering, can display the lead source effectiveness by industry. Another form that includes the industry field is the Account

form. If your system administrator adds custom industries to the Leads form, they should also add them to the Account form to keep the two lists in sync.

- **Annual Revenue**

  You must enter numbers between 0.00 and 1,000,000,000.00.

  You can use commas and a decimal point. You cannot use a currency symbol, such as the dollar ($), euro (€), or yen (¥).

  - **SIC Code**

    Indicate the Standard Industrial Classification (SIC) code for this account. You can search on SIC for organizations with a particular code to display all accounts of businesses in that category.Enter a code of 20 characters or fewer.

  - **No. of Employees**

    You must enter a whole number between 0 and 1,000,000.

5. Under **Information**, click **Notes and Activities**. In the Notes section, click **Add a new note**, and add the information that applies to your record.
6. In the **Preferences** section, enter information or observe any noted restrictions or requirements as needed:

   - **Owner**

     This box is filled automatically with the name of the user who is creating the record. You can click the **Lookup** button to search for other records.

   - **Status Reason**

     This value appears in the list of leads in the Leads area. You can sort by the **Status Reason** column in that area to quickly view new leads or those already contacted.

   - **Contact Methods**

     - **Preferred**

       Select the option that best describes the preferred method of contact.

     - **E-mail**

       If you select **Allow**, Microsoft Dynamics CRM allows all e-mail, including e-mails related to campaign activities, to be sent to the e-mail address associated with the record. However, if you select **Do Not Allow**, Microsoft Dynamics CRM does not allow any e-mail to be sent to the e-mail address associated with the record.

     - **Bulk E-mail**

       If you select **Allow**, Microsoft Dynamics CRM allows any e-mail as part of a bulk e-mail process, including bulk e-mails related to campaign activities, to be sent to the e-mail address associated with the record. However, if you select **Do Not Allow**, Microsoft Dynamics CRM does not allow any bulk e-mail to be sent to the e-mail address associated with the record.

     - **Phone**

The selected option simply provides information to anyone who views the record. This field is not used by Microsoft Dynamics CRM to control initiating or receiving phone calls.

- **Fax**

  The selected option simply provides information to anyone who views the record.

- **Mail**

  The selected option simply provides information to anyone who views the record. This field is not used by Microsoft Dynamics CRM to control initiating or receiving mail.

- **Marketing Information**

  - **Source Campaign**

    Search for and enter the campaign record if this lead was generated as a result of a campaign that has been created in Microsoft Dynamics CRM.

  - **Send Marketing Materials**

    If you select **Send**, marketing material corresponding to campaigns is sent to the respective addresses (e-mail, physical address) for the record. This includes general marketing mailers that might be sent on a regular basis that are not part of a targeted marketing campaign. If you select **Do Not Send**, marketing materials are not sent, nor can activities related to sending marketing materials be created for the record.

  - **Last Date Included in Campaign**

    Microsoft Dynamics CRM automatically sets the date for this field when any marketing communication is sent to the addresses for the record. You can also manually update this field and enter a date. This field is used as filter criteria in Marketing Automation. For example, the **Anti-Spam Setting** area of a Campaign form uses the date in this field to make sure that you do not send frequent mailers to a customer.

7. Click **Save** or **Save and Close**.

   Resolve potential duplicate records.

If the system detects that your record might be a potential duplicate, instead of saving the record, Microsoft Dynamics CRM displays the **Duplicates Detected** dialog box.

1. To open a record to make sure it is a potential duplicate, in the **Potential duplicate records** list, double-click the record.

   - If the duplicate-detection rule identified potential duplicate records in other record types, review records from each record type listed.

2. If your new or updated record is not a duplicate, to create the new record, click **Save Record**.

   - OR -

   If your new or updated record is a duplicate, to cancel your changes, click **Cancel**.

Notes

- If you enter a duplicate record within a few minutes of entering the first record, Microsoft Dynamics CRM will not detect the duplicate record. The matchcodes for new and updated records are created every five minutes, rather than as a record is created.

- Duplicate detection can take place only if duplicate detection is enabled in **Duplicate Detection Settings** and if at least one duplicate-detection rule exists for the record type. More information: *Avoiding Duplicate Records* (on page 69)

  Tip

  To qualify or disqualify a lead, you convert the lead. First, open the lead that you want to convert, click **Convert Lead**, select options for how you want to convert the lead, and then click **OK**.

Related Topics

Work with Leads 299
Managing Leads 289
Work with Marketing Lists 389
Requesting User Interface Changes 220

Qualify and convert a lead to an account, contact, and/or opportunity

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Sales Permissions

Turning leads into customers, or at least opportunities, is the goal of any organization. After you qualify a lead based on the metrics used by your organization, use Microsoft Dynamics CRM to create up to three new records quickly in which the lead is represented as an account, contact, or opportunity.

Only one lead at a time can be converted, unless you add the leads you want to convert to a marketing list. More information: *Work with Marketing Lists* (on page 389)

1. In the Navigation Pane, click **Sales**, and then click **Leads**.
2. In the list of leads, open the lead you want to qualify and convert.
3. On the **Lead** tab, in the **Actions** group, click **Qualify**.
4. In the **Convert Lead** dialog box, **Qualify and convert into the following records** is selected by default. Select one or more of the following:

   - **Account**

     Select this check box to create an account record. Do this if there is an actual company with which you are doing business.

   - **Contact**

     Select this check box to create a contact record. Do this if you are doing business with an specific individual at a company or just an individual customer (consumer).

   - **Opportunity**

Select this check box to create an opportunity record. If this is the only option you select, then in the **Potential Customer** box, you must associate an account or contact with the lead. Click the **Lookup** button to search for an account or contact.

- **Currency**

  If you select **Opportunity**, you must select the currency in which to calculate the opportunity.

- **Open newly created records**

  Select this check box to open each record in a new window.

5. Click **OK**.
6. If you did not select the **Open newly created records** check box, then you must click the **Close** button to close the lead record.

Tip

To view the lead record after it has been converted to an opportunity, open the opportunity, and then click **Originating Lead** on the **Administration** tab.

Notes

- Based on the security privileges assigned to your user account, you might not be able to qualify leads that you do not own. If you have to qualify them, you must have the necessary privileges. Also, regardless of who qualifies the lead and performs the conversion, all the newly created records are, by default, owned by the user who owned the original lead.
- Any notes on a lead record do not transfer to the new account, contact, or opportunity record. The notes remain with the originating lead record.
- When you convert a lead, the new record that is created will not be checked to see if it is a duplicate.

Related Topics

Work with Leads 299
Convert Lead Dialog Box 310
Managing Leads 289
Work with Marketing Lists 389

Qualify or convert multiple records at once

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Sales Permissions

If you need to disqualify a group of leads or if you decide a group of leads are all good, you do not have to process them one by one. Instead, put the leads into a marketing list, and then disqualify the whole group or qualify them by converting the whole group into accounts, contacts, or opportunities all in one step.

1. Create a new marketing list.
   a. In the Navigation Pane, click **Marketing** or **Sales**, and then click **Marketing Lists**.
   b. On the Actions toolbar, click **New**.
   c. In the **Name** box, type a name for the list, and in the **Member Type** box, select **Lead**.
   d. Click **Save**.
2. Under **Related**, click **Marketing List Members**.
3. Under **List Tools**, on the **Marketing List Members** tab, in the **Actions** group, click **Manage Members**.
4. In the **Manage Members** dialog box, click **Use Advanced Find to add members**, and then click **OK**.
5. Create a query to find the list of leads to disqualify or convert.
   a. From the **Use Saved View** list, select **My Open Leads**.
   b. Add any additional criteria you need to the query.

   Tip

   If this query is one that you will use again, click **Save As**, and specify a name for the query.
6. To see the records, click **Find**.
7. Select one of the option buttons at the bottom of the window either to add all the leads returned by the search to the list or to add only selected leads to the list, and then click **Add to Marketing List**.
8. In the marketing list, select multiple lead records:
   - Select several records by pressing the CTRL key while you click each record.
   - Select a sequence of records by clicking the first record that you want, and then press the SHIFT key while you select the last record that you want.
   - Select all records on the page by selecting the **Select/clear all records on this page** check box at the top of the list.

   Tip

   By default, the Microsoft Dynamics CRM Web application displays 50 records per page. You can increase this up to a maximum of 250 records per page to increase the number of records you can select at one time. To increase the number of records displayed per page:

   1. On the **File** menu, click **Options**.
   2. On the **General** tab, in the **Records Per Page** list, select the number of records to display per page.
   3. Click **OK**. This changes the number of items that is displayed for all lists, which may slow response time when you switch record types. Therefore, you might want to set it back to a smaller number when you are done with this bulk action.
9. After you select the leads you want to convert, under **List Tools**, on the **Marketing List Members** tab, click **Qualify**.

10. In the **Convert Lead** dialog box, disqualify the leads, or select the record types to convert the leads to, and then click **OK**. The leads will still appear on your marketing list, but will no longer appear in your **My Open Leads** view.

Related Topics

Work with Leads....299
Managing Leads....289
Work with Marketing Lists....389

Disqualify and close a lead

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Sales Permissions

When you decide that a lead will not turn into an opportunity or become a customer, you can disqualify it and still have an audit trail for your sales process. You can reactivate the record, including any attachments and notes, without having to re-enter all the data if the lead contacts you in the future. Deleting the record also removes any attachments and notes.

1. In the Navigation Pane, click **Sales**, and then click **Leads**.
2. In the list of leads, open the lead that you want to disqualify.
3. In the **Actions** group, click **Qualify**.
4. In the **Convert Lead** dialog box, select **Disqualify**, and then in the **Status** list, click an option.
5. Click **OK**, and then close the record.

Note
Disqualified leads appear in the **Closed Leads** view.

Related Topics

Work with Leads....299
Convert Lead Dialog Box....310
Managing Leads....289

Reactivate a closed lead

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Sales Permissions

You disqualify a lead by closing the lead record. Closed leads can be reactivated. Deleted leads are permanently removed and cannot be reactivated. When you reactivate a lead, you save time by not having to re-enter any data and you maintain the original history of the lead.

1. In the Navigation Pane, click **Sales**, and then click **Leads**.
2. In the **View** list, click **Closed Leads**.
3. In the list of closed leads, open the lead you want to reactivate.
4. In the **Actions** group, click **Reactivate Lead**.
5. In the **Confirm Lead Activation** dialog box, click **OK**.
6. Click **Save** or **Save and Close**.

Related Topics

Work with Leads 299
Managing Leads 289

Add or remove a customer record in a marketing list

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Sales Permissions

You can add a customer record, such as a lead, account, or contact, to a marketing list. If a customer record is added to a marketing list from another area within Microsoft Dynamics CRM, the customer record is updated to reflect this association. Therefore, if you want to add a customer record, such as a lead, to a marketing list, you might find that the lead is already associated with the list.

1. In the Navigation Pane, click **Sales**, and then click **Leads**, **Accounts**, or **Contacts** depending on which type of record you want to add to a marketing list.
2. In the list, open the record that you want to add to a marketing list.
3. In the **Collaborate** group, click **Add to Marketing List**.
4. In the **Look Up Record** dialog box, locate and select the marketing list you want to add the record to, and then click **OK**.
5. Click **Save** or **Save and Close**.

Note
To remove a record from a marketing list, open the customer record you want to remove from the marketing list. In the Navigation Pane, under **Marketing**, click **Marketing Lists**. Select the marketing

list that you want to remove, and then, in the **Records** group, click **Remove**. In the confirmation message, click **OK**.

Tip
If you cannot locate the marketing list you want to add, you might need to create it. To do this, in the **Look Up Records** dialog box, click **New** and then complete the form.

Related Topics

Work with Contacts 276
Work with Accounts 271
Managing Accounts and Contacts 265
Work with Leads 299
Managing Leads 289
Work with Marketing Lists 389

View associated campaigns from customer records

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Sales Permissions

You can view a list of campaigns for a customer from within the Customer Record form. When a customer record is added to a marketing list and that marketing list is added to a campaign, the customer record is updated to reflect this association.

1. In the Navigation Pane, click **Sales**, and then click **Leads**, **Accounts**, or **Contacts**, depending on which type of record you want to view associated campaigns for.
2. In the list, open the record that you want to view.
3. Under **Marketing**, click **Campaigns** to see the list of campaigns the customer is included in.

Related Topics

Work with Contacts 276
Work with Leads 299
Managing Leads 289
Work with Accounts 271
Managing Accounts and Contacts 265
Work with Campaigns and Campaign Templates 375

Create a quick campaign

Can I do this task?

This task requires permissions that are found in all default marketing security roles. More information about specific permissions and performing this task while offline: Marketing Permissions

You can use quick campaigns to create one type of activity for many accounts, contacts, or leads at once.

1. Select the records or list that you want to run a quick campaign on, and then start the Create Quick Campaign Wizard.

   From a list of records, including the results of a search

   You can run a quick campaign from any list of accounts, contacts, or leads.

   a. Select the record or records for which you want to create a quick campaign. If you want to include all records on the current page or all records on all pages, then skip this step.

   b. On the Actions toolbar, click **Create Quick Campaign** , and then click one of the following:

      - **For Selected Records**

        Select this option if you have selected one or more records in the list.

      - **For All Records on Current Page**

        Select this option to include all records on the page for the quick campaign activity.

      - **For All Records on All Pages**

        Select this option to include all records on all pages for the quick campaign activity.

   From the Marketing Lists list

   You can run a quick campaign on one or more marketing lists in the **Marketing Lists** list.

   a. In the Navigation Pane, click **Marketing** or **Sales**, and then click **Marketing Lists**.

   b. Select the marketing list or marketing lists for which you want to create a quick campaign.

   c. On the Actions toolbar, click **Create Quick Campaign**, and then click **For Selected Records**.

   From a marketing list

   You can run a quick campaign on the accounts, contacts, or leads in any marketing list.

   a. In the Navigation Pane, click **Marketing** or **Sales**, and then click **Marketing Lists**.

   b. Double-click the marketing list for which you want to create a quick campaign.

   c. On the Actions toolbar, click **Create Quick Campaign**.

2. In the Create Quick Campaign Wizard, follow the instructions to create the quick campaign.

   Notes

   - You cannot add additional records to a quick campaign after you have created it.
   - In the Create Quick Campaign Wizard, you can select who you want Microsoft Dynamics CRM to assign the activity to and whether Microsoft Dynamics CRM should perform the activity automatically for appropriate activities (such as sending e-mail messages). For example, if you are creating a phone call activity for all of the sales representatives, you can select the phone call

activity, and then select **The owners of the records that are included in the quick campaign**. Each sales representative can then see the activity and take action on it. However, if you are creating a large number of e-mail activities that Microsoft Dynamics CRM will perform automatically, you can assign the e-mail activity to yourself instead of the record owners.

- Whether or not some activities are performed automatically depends on an option available to users who have the Organization Settings Write privilege. More information: Manage System Settings

Related Topics

Work with Quick Campaigns 382
Creating and Managing Marketing Lists....387
Planning Campaigns 375
Understanding Quick Campaigns 382

Convert Lead Dialog Box

Use this dialog box to qualify or disqualify a lead as a potential customer.

To qualify leads, you convert them into opportunities with associated accounts or contacts or into new accounts or contacts. To disqualify leads, click the **Disqualify** option which closes the leads without converting them.

Managing Opportunities

An opportunity is a potential sale, which is similar to a lead. However, the subtle difference is that with an opportunity you can forecast sales revenue, set a potential close date, and factor in a probability for the sale to occur.

When you create an opportunity, you must specify an existing account or contact record. Also, an opportunity requires that you link the record to a particular price list. This is needed for the automated pricing of the proposed products that the opportunity is interested in purchasing.

Using opportunities in your business process enables you to run pipeline reports to view estimated revenue flows based on pending new sales.

Work with Opportunities

Opportunities represent a potential sale to an account or contact.

Create or edit an opportunity

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Sales Permissions

1. In the Navigation Pane, click **Sales**, and then click **Opportunities**.
2. In the **Records** group, click **New** or open the record that you want to edit.
3. In the **General** section, enter or edit information or observe any noted restrictions or requirements as needed:
   - **Topic**

     This information should reflect what the opportunity is interested in. For example, if an existing customer called and asked for details on a product, then list the name of the product as the topic.
   - **Potential Customer**

     This customer is the account or contact associated with this opportunity. This value appears in the list of opportunities on the main opportunities page.
   - **Revenue**

     If pricing is automated for your company, select **System Calculated**. If not, select **User Provided**.
   - **Est. Revenue**

     Opportunities with products added to them have their estimated revenue value calculated based on the base price, volume discounts, manual discounts, taxes, and other pricing modifications. When opportunities are saved, Microsoft Dynamics CRM recalculates the estimated revenue value based on any changes to the products or product quantities associated with the opportunity. This value appears in the list of opportunities on the main opportunities page.
   - **Probability**

     Enter a number from 1 to 100 to indicate the likelihood of a sale occurring.
   - **Est. Close Date**

     You must enter the date in the format your organization has set for dates. For example, 01/01/2006 or 31.12.2005.

     If you omit leading zeros in a date, Microsoft Dynamics CRM will add them automatically. For example, when you type 1/1/06, Microsoft Dynamics CRM will display it as 01/01/2006, if that is the date format of your organization. This value appears in the list of opportunities on the main opportunities page.
   - **Currency**

     Select the currency in which to calculate the opportunity.
4. In the **Line Items** section, enter information or observe any noted restrictions or requirements as needed:
   - **Price List**

     If your company has price lists set up, specify the appropriate price list.

5. Under **Information**, click **Notes & Activities**. In the **Notes** section, add the information that applies to your record.
6. Under **Preferences**, enter information or observe any noted restrictions or requirements as needed:
   - **Owner**

     This box is filled automatically with the name of the user who is creating the record. You can click the **Lookup** button to search for other records.
   - **Originating Lead**

     If this opportunity was the result of converting a lead, then this field will automatically show the lead record.
   - **Source Campaign**

     If this opportunity was a result of converting a campaign response to a lead, or if this field was set when the lead was created, then this field will automatically show the campaign record. However, you cannot set the **Source Campaign** field for a completely new opportunity record.
7. Click **Save** or **Save and Close**.

Note
To convert an opportunity into the originating lead, open the opportunity. In the **Preferences** section, click the lead in the **Originating Lead** box. Then, on the lead form, in the **Actions** group, click **Reactivate Lead**. Close the opportunity that was created when you converted the lead.

Tips

- When the **Look Up Records** dialog box is open, if the record you need doesn't exist, click **New**, and create the record.
- To add a related record, on the **Add** tab, in the **Create Relationship** group, click **Relationship**. Complete the form as needed.

Related Topics

Work with Opportunities 310
Managing Opportunities 310
Requesting User Interface Changes 220

Add or remove a product

Can I do this task?

This task requires a manager, vice president, CEO-Business Manager, System Administrator, or System Customizer security role or equivalent permissions. More information about specific permissions and performing this task while offline: Sales Permissions

1. In the Navigation Pane, click **Sales**, and then click **Opportunities**.

2. In the list of opportunities, open the opportunity to which you want to add a product.
3. Under **Line Items**, verify that a price list appears in the **Price List** box. You can click the **Lookup** button to search for and select records. You must select a price list before you can add a product.
4. If you added a price list, you must save the opportunity form before you can add a product. Click **Save**.
5. On the form, under **Line Items**, click the area under the **Price List** box.
6. Under **List Tools**, on the **Opportunity Products** tab, in the **Records** group, click **Add New Opportunity Product**.
7. On the **Opportunity Product** form, enter information or observe any noted restrictions or requirements as needed:

   - **Select Product**

     To use an existing product, leave the **Existing** option selected.

     If you are using an existing product, click the **Lookup** button to search for and add a product.

     - OR -

     To create a write-in product, click **Write-In**, and then type the name of the product.

   Note

   The available options and fields change depending upon whether you choose an existing or write-in product.

   - **Unit**

     Search for and select a unit.

   - **Pricing**

     Select the pricing option. By default, Microsoft Dynamics CRM will use the price that is listed in the product catalog. To override the price, click **Override Price**. If you choose to override the price, you can specify a price that you want to charge for each unit of the product.

   - **Quantity**

     You must enter the quantity of the product or service that will be included.

     You can enter numbers between 0.00 and 1,000,000,000.00. You can use a comma and a decimal point. You cannot use a currency symbol, such as the dollar ($), euro (€), or yen (¥).

   - **Manual Discount**

     If you want, you can enter a discount to the product.

     You can enter numbers between 0.00 and 1,000,000,000.00.

     You can use a comma and a decimal point. You cannot use a currency symbol, such as the dollar ($), euro (€), or yen (¥).

   - **Tax**

     If required, enter the appropriate tax amount.

8. Click **Save** or **Save and Close**.

Notes

- You can also remove a product from an opportunity. Open the opportunity, under **Line Items**, select the product that you want to remove. Under **List Tools**, on the **Opportunity Products** tab, in the **Records** group, click **Delete Opportunity Product**.
- To add a write-in product, you must create at least one price list in the product catalog. To add a product from the product catalog, you must create at least one unit group, price list, and product. More information: Creating the Product Catalog

Related Topics

Work with Opportunities 310
Managing Opportunities 310
Requesting User Interface Changes 220

Associate an account or contact with an opportunity

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Sales Permissions

You associate opportunities with accounts or contacts by creating an opportunity relationship between them. The relationship you set up is based on your selections on the **Opportunity Relationship** form. Therefore, if you want to create a relationship between an account or contact and an opportunity, be sure that you complete the form.

1. In the Navigation Pane, click **Sales**, and then click **Opportunities**.
2. In the list of opportunities, open the opportunity to which you want to add a relationship with a customer record.
3. Click the **Add** tab. In the **Create Relationship** group, click **Relationship**.
4. On the **Opportunity Relationship** form, enter this information:
   - **Opportunity**

     This is a required field. If you opened the form from an opportunity record, the opportunity is automatically listed on the form. Click the **Lookup** button to select a different opportunity.
   - **Customer**

     This is a required field. If you opened the form from an account or contact record, the account or contact is automatically listed on the form. Click the **Lookup** button to search for and select an account or contact.
   - **Customer Role**

     Select an option from the list. This field can be customized, so the values will vary.

Your organization might set up relationship roles, to indicate the role of your customers as they relate to your business. This field is not required.

If there are no relationship roles in the list or the relationship role you want is not listed, contact your system administrator and ask them to add the relationship role to the **Relationship Roles** area, which is located in the **Settings** area.

- **Description**

  Use this field to provide additional information about the relationship.

5. Click **Save** or **Save and Close**.

   Repeat this step to save the account or contact.

Notes

- To remove a relationship, open the opportunity, and then under **Common**, click **Relationships**. In the relationships list, click the relationship that you want to delete, and then, on the Actions toolbar, click the **Delete** button .
- You cannot set up duplicate relationships between a customer record and an opportunity. For example, if you create a relationship between an account and the opportunity, and the customer's relationship role is set to Distributor, you cannot create a new relationship for the account that uses the same customer opportunity and relationship role.

Related Topics

Work with Opportunities 310
Managing Opportunities 310

Add or remove competitors

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Sales Permissions

You can add a known competitor to a sales literature record to help you track other companies who are competing against you and your products or services. If you determine that the competitor you have associated with the sales literature is no longer a threat to making the sale, you can disassociate that competitor from the sales literature without deleting the competitor from Microsoft Dynamics CRM.

1. In the Navigation Pane, click **Sales**, and then click **Sales Literature**.
2. In the list of sales literature, open the sales literature to which you want to add competitors.
3. Under **Sales**, click **Competitors**.
4. In the **Records** group, click **Add Existing Competitor**.
5. In the **Look Up Records** dialog box, locate and select the competitors, and then click **OK**.
6. Click the **Sales Literature** tab. Click **Save** or **Save and Close**.

Notes

- To remove competitors from sales literature, follow steps 1, 2, and 3 above to navigate to the appropriate area. Select the competitors you want to remove. In the **Records** group, click **Remove**. In the confirmation message, click **OK**.
- When you add or remove a competitor from a sales literature record, both records are updated to reflect the association between them.

Related Topics

Work with Competitor Records 322
Competing for Customers 322

Recalculate the estimated revenue

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Sales Permissions

1. In the Navigation Pane, click **Sales**, and then click **Opportunities**.
2. In the list of opportunities, open the opportunity for which you want to recalculate the estimated revenue.
3. In the **Line Items** section, modify the list of products associated with the opportunity. (When opportunities are saved, Microsoft Dynamics CRM recalculates the estimated revenue value based on any changes to the products or product quantities associated with the opportunity.)
4. In the **Forecast Information** section, verify that **System Calculated** is selected, and then in the **Actions** group, click **Recalculate Opportunity**.
5. Click **Save** or **Save and Close**.

Related Topics

Work with Opportunities 310
Work with Quotes 340
Work with Orders 352
Work with Invoices 364
Managing Opportunities 310

Close an opportunity

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Sales Permissions

Whether you win a sale or lose it, you probably want to close the opportunity. If you have lost the sale, you can delete the opportunity, but deletions are not recommended because they are permanent. If you delete the opportunity, related items such as attachments and notes are also deleted, in addition to the audit trail for your sales organization. Therefore, it is best to close the opportunity. You will have the option to reopen the opportunity later if it becomes a viable sale.

1. In the Navigation Pane, click **Sales**, and then click **Opportunities**.
2. In the list of opportunities, open the opportunity you want to close.
3. In the **Actions** group, click **Close as Won** or **Close as Lost**.
4. In the **Close Opportunity** dialog box, click a **Status** option.

   If you select **Won**, enter the appropriate information in the following fields:

   - **Status Reason**

     The status for this field depends on whether the status is **Won** or **Lost**. Your systems administrator can make changes to the default status for your organization if desired.

   - **Actual Revenue**

     You must enter numbers between 0.00 and 1,000,000,000.00.

     You can use commas and a decimal point. You cannot use a currency symbol, such as the dollar ($), euro (€), or yen (¥).

     This value should represent the actual agreed upon price.

   - **Close Date**

     You must enter the date in the format your organization has set for dates. For example, 01/01/2006 or 31.12.2005.

     If you omit leading zeros in a date, Microsoft Dynamics CRM will add them automatically. For example, when you type 1/1/06, Microsoft Dynamics CRM will display it as 01/01/2006, if that is the date format of your organization.

   - **Description**

     Enter the reason for the win.

     If you select **Lost**, enter the appropriate information in the following fields:

   - **Status Reason**

     Select an option. The default options are **Canceled** or **Out-Sold**. Your systems administrator can change the default status for your organization that you want.

   - **Actual Revenue**

     You do not have to enter a value. However, it is helpful to know what the deal was worth had it been achieved.

     You must enter numbers between 0.00 and 1,000,000,000.00.

You can use commas and a decimal point. You cannot use a currency symbol, such as the dollar ($), euro (€), or yen (¥).

- **Close Date**

  You must enter the date in the format your organization has set for dates. For example, 01/01/2006 or 31.12.2005.

  If you omit leading zeros in a date, Microsoft Dynamics CRM will add them automatically. For example, when you type 1/1/06, Microsoft Dynamics CRM will display it as 01/01/2006, if that is the date format of your organization.

- **Competitor**

  If you know the competitor you lost the deal to, click the **Lookup** button to search for a competitor.

- **Description**

  Enter the reason for the loss.

5. Click **OK**.
6. Click **Save** or **Save and Close**.

Related Topics

Work with Opportunities 310
Delete Things 19
Managing Opportunities 310

Reopen an opportunity

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Sales Permissions

An opportunity you closed previously might become viable again. If this occurs, you can reopen the opportunity. You cannot reopen a deleted opportunity. You must create a new opportunity if you deleted one instead of closing it.

1. In the Navigation Pane, click **Sales**, and then click **Opportunities**.
2. In the **View** list, click **Closed Opportunities**.
3. In the list of opportunities, open the opportunity you want to reopen.
4. In the **Actions** group, click **Reopen Opportunity**.
5. In the **Reopen This Opportunity** dialog box, click **OK**.
6. Click **Save** or **Save and Close**.

Related Topics

Work with Opportunities 310
Delete Things 19
Managing Opportunities 310

Opportunity Product Form

Use this form to add a product to an opportunity.

Can I do this task?

This task requires a manager, vice president, CEO-Business Manager, System Administrator, or System Customizer security role or equivalent permissions. More information about specific permissions and performing this task while offline: Sales Permissions

1. In the Navigation Pane, click **Sales**, and then click **Opportunities**.
2. In the list of opportunities, open the opportunity to which you want to add a product.
3. Under **Line Items**, verify that a price list appears in the **Price List** box. You can click the **Lookup** button to search for and select records. You must select a price list before you can add a product.
4. If you added a price list, you must save the opportunity form before you can add a product. Click **Save**.
5. On the form, under **Line Items**, click the area under the **Price List** box.
6. Under **List Tools**, on the **Opportunity Products** tab, in the **Records** group, click **Add New Opportunity Product**.
7. On the **Opportunity Product** form, enter information or observe any noted restrictions or requirements as needed:

   - **Select Product**

     To use an existing product, leave the **Existing** option selected.

     If you are using an existing product, click the **Lookup** button to search for and add a product.

     - OR -

     To create a write-in product, click **Write-In**, and then type the name of the product.

   Note

   The available options and fields change depending upon whether you choose an existing or write-in product.

   - **Unit**

     Search for and select a unit.

   - **Pricing**

Select the pricing option. By default, Microsoft Dynamics CRM will use the price that is listed in the product catalog. To override the price, click **Override Price**. If you choose to override the price, you can specify a price that you want to charge for each unit of the product.

- **Quantity**

  You must enter the quantity of the product or service that will be included.

  You can enter numbers between 0.00 and 1,000,000,000.00. You can use a comma and a decimal point. You cannot use a currency symbol, such as the dollar ($), euro (€), or yen (¥).

- **Manual Discount**

  If you want, you can enter a discount to the product.

  You can enter numbers between 0.00 and 1,000,000,000.00.

  You can use a comma and a decimal point. You cannot use a currency symbol, such as the dollar ($), euro (€), or yen (¥).

- **Tax**

  If required, enter the appropriate tax amount.

8. Click **Save** or **Save and Close**.

Notes

- You can also remove a product from an opportunity. Open the opportunity, under **Line Items**, select the product that you want to remove. Under **List Tools**, on the **Opportunity Products** tab, in the **Records** group, click **Delete Opportunity Product**.
- To add a write-in product, you must create at least one price list in the product catalog. To add a product from the product catalog, you must create at least one unit group, price list, and product. More information: Creating the Product Catalog

Related Topics

Work with Opportunities 310
Managing Opportunities 310
Requesting User Interface Changes 220

Opportunity Relationship Dialog Box

Use this dialog box to specify the type of relationship between opportunities, accounts, and contacts and the role that they have relative to each other; that is, how they affect, influence, or contribute to each other.

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Sales Permissions

You associate opportunities with accounts or contacts by creating an opportunity relationship between them. The relationship you set up is based on your selections on the **Opportunity Relationship** form. Therefore, if

you want to create a relationship between an account or contact and an opportunity, be sure that you complete the form.

1. In the Navigation Pane, click **Sales**, and then click **Opportunities**.
2. In the list of opportunities, open the opportunity to which you want to add a relationship with a customer record.
3. Click the **Add** tab. In the **Create Relationship** group, click **Relationship**.
4. On the **Opportunity Relationship** form, enter this information:
   - **Opportunity**

     This is a required field. If you opened the form from an opportunity record, the opportunity is automatically listed on the form. Click the **Lookup** button to select a different opportunity.
   - **Customer**

     This is a required field. If you opened the form from an account or contact record, the account or contact is automatically listed on the form. Click the **Lookup** button to search for and select an account or contact.
   - **Customer Role**

     Select an option from the list. This field can be customized, so the values will vary.

     Your organization might set up relationship roles, to indicate the role of your customers as they relate to your business. This field is not required.

     If there are no relationship roles in the list or the relationship role you want is not listed, contact your system administrator and ask them to add the relationship role to the **Relationship Roles** area, which is located in the **Settings** area.
   - **Description**

     Use this field to provide additional information about the relationship.
5. Click **Save** or **Save and Close**.

   Repeat this step to save the account or contact.

Notes

- To remove a relationship, open the opportunity, and then under **Common**, click **Relationships**. In the relationships list, click the relationship that you want to delete, and then, on the Actions toolbar, click the **Delete** button .
- You cannot set up duplicate relationships between a customer record and an opportunity. For example, if you create a relationship between an account and the opportunity, and the customer's relationship role is set to Distributor, you cannot create a new relationship for the account that uses the same customer opportunity and relationship role.

Related Topics

Work with Opportunities 310

Managing Opportunities 310

Competing for Customers

Using competitor information management, you can compile a repository of information, such as product literature, pricing structures and product reviews, for each of your competitors. If you add products or sales literature to a competitor record, your sales staff will be able to access the competitor data from within the product or sales literature forms.

You can also create and maintain information about your competitors' strengths and weaknesses, and the opportunities you are both working on. If you create a relationship between a competitor and an opportunity, you can access information about both from either form.

The competitor information management in Microsoft Dynamics CRM also helps you associate opportunities to competitors so you can assess opportunities lost to or won against each competitor.

Work with Competitor Records

Competitors represent people or organizations that your business unit competes with for sales opportunities.

The following sales reports are available:

This topic shows you how to use the different reports. To find more information, when you generate a report, click **Help**, and then click **Help on This Page**.

- *Account Distribution Report* (on page **Error! Bookmark not defined.**)

  Use this report to identify patterns in your top revenue-generating accounts using two charts. The earned revenue chart displays the earned revenue grouped by a market facet, such as product, territory, or industry. The accounts count chart displays the amount of earned revenue using the same grouping as the earned revenue chart.

- *Account Overview Report* (on page 99)

  Use this report to obtain a one-page overview of everything occurring with an account. The report displays a profile of the account, contact information, and summaries of opportunities and case activities.

- *Account Summary Report* (on page 100)

  Use this report to determine historically what has occurred with an account. This report also displays what is scheduled to occur in the future. The report displays a chronological summary for an account, including sales and service activities, notes, and records.

- *Activities Report* (on page 101)

  Use this report to identify patterns in activities. Activities can be grouped by owner or activity type, or by the record the activity is regarding.

- *Competitor Win Loss Report* (on page 101)

  Use this report to compare how your sales team performs against your competitors. The report displays a list of competitors, with data on open, closed, won, and lost opportunities for each.

- *Invoices Report* (on page 102)

  Use this report to print invoices.

- Invoice Status Report

  Use this report to view your accounts receivable. The chart displays the number of invoices grouped by status with the total amount of invoices in each status.

- *Lead Source Effectiveness Report* (on page 103)

  Use this report to compare how effective your lead sources are at generating quality opportunities. The report lists the percentage of qualified leads, and leads that generate revenue for each lead category.

- *Neglected Accounts Report* (on page 107)

  Use this report to identify accounts that have not been contacted recently. The report displays a chart with accounts that have had no activities completed in a specified number of days.

- *Neglected Leads Report* (on page 104)

  Use this report to identify any leads that have not been contacted. The report displays a chart of leads that have had no associated activities or notes during a specified time period.

- *Orders Report* (on page 104)

  Use this report to print orders.

- *Products by Account Report* (on page 108)

  Use this report to see which products are used by an account. For each account, the report lists the associated products.

- *Products by Contact Report* (on page 109)

  Use this report to see which products are used by a contact. For each contact, the report lists the associated products.

- Progress Against Goals Report
- Use this report to view the sales progress against the primary and subordinate goals. This report displays a chart with the target values and the actual values of the goals.

- *Quotes Report* (on page 105)

  Use this report to print quotes.

- *Sales History Report* (on page 106)

  Use this report to view a history of sales performance by sales representative. The report displays a chart of both lost and earned revenue. The report uses data only from the closed opportunities, and calculates the earned revenue from Won opportunities and the lost revenue from the lost opportunities.

- *Sales Pipeline Report* (on page 106)

  Use this report to see anticipated potential sales. The report displays a chart of potential sales grouped by user, sales territory, customer territory, date, products, rating, or sales stage.

If the default reports don't provide the information you need, try creating an Advanced Find search, and exporting the results to Microsoft Office Excel.

Note

This topic documents the list of default reports as they were shipped. If this list differs from the reports that are available to you, contact your report administrator or system administrator for information about the customized reports.

Related Topics

Work with Opportunities 310
Work with Leads 299
Work with Contacts 276
Work with Accounts 271

Create or edit a competitor

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Sales Permissions

Tracking competitors is a key aspect of a sales process. The more information that your team has about a competitor's strengths, weaknesses, opportunities, and the threats a competitor might have to your organization's ability to make a sale, the more likely you are to win against that company.

1. In the Navigation Pane, click **Sales**, and then click **Competitors**.
2. In the **Records** group, click **New**, or open the record that you want to edit.
3. In the **General** section, enter or edit information or observe any noted restrictions or requirements as needed:

   - **Name**

     Type a name that is between 1 and 100 characters. The name should be meaningful and unique.You can use accent marks when you enter data, for example, in a customer's name. Your ability to sort and find information is not affected by these accent marks.

   - **Ticker Symbol**

     If you enter a ticker symbol for a market outside the United States, you must prefix it with the country code, for example US:MSFT (*country code:ticker symbol*). This information is available only for markets that are currently listed on the MSN Money Web site. In addition to the United States (US), MSN Money also provides information for markets in Australia (AU), Belgium (BE), Canada (CA), France (FR), Germany (DE), Italy (IT), Japan (JP), Netherlands (NL), Spain (ES), Sweden (SE), and the United Kingdom (UK). For more information, go to the *MSN Money Web site* (see MSN Money Web site - *http://go.microsoft.com/fwlink/?LinkId=95957*).

   - **Key Product**

     Enter the competitor's product that you most frequently compete with for sales.

   - **Web Site**

     Web site addresses must be valid. For example, http://www.adventure-works.com.

   - **Reported Revenue**

     You must enter numbers between 0.00 and 1,000,000,000.00.

You can use commas and a decimal point. You cannot use a currency symbol, such as the dollar ($), euro (€), or yen (¥).

- **Address**

  Enter all the address information that you have for this competitor. Note this restriction:

  ZIP/Postal Code

  Enter a code of 20 characters or fewer.

4. In the **Analysis** section, enter everything that you know about the competitor.
5. In the **Notes** section, click **Add a new note**, and add the information that applies to your record.
6. Click **Save** or **Save and Close**.

   Resolve potential duplicate records.

If the system detects that your record might be a potential duplicate, instead of saving the record, Microsoft Dynamics CRM displays the **Duplicates Detected** dialog box.

1. To open a record to make sure it is a potential duplicate, in the **Potential duplicate records** list, double-click the record.
   - If the duplicate-detection rule identified potential duplicate records in other record types, review records from each record type listed.
2. If your new or updated record is not a duplicate, to create the new record, click **Save Record**.

   - OR -

   If your new or updated record is a duplicate, to cancel your changes, click **Cancel**.

Notes

- If you enter a duplicate record within a few minutes of entering the first record, Microsoft Dynamics CRM will not detect the duplicate record. The matchcodes for new and updated records are created every five minutes, rather than as a record is created.
- Duplicate detection can take place only if duplicate detection is enabled in **Duplicate Detection Settings** and if at least one duplicate-detection rule exists for the record type. More information: *Avoiding Duplicate Records* (on page 69)

Related Topics

Work with Competitor Records 322
Managing Leads 289
Competing for Customers 322

Add or remove products for a competitor

Can I do this task?

This task requires a manager, vice president, CEO-Business Manager, System Administrator, or System Customizer security role or equivalent permissions. More information about specific permissions and performing this task while offline: Sales Permissions

Knowing the products that your competitors carry helps you to identify areas within your own inventory where you can expect the greatest challenges to making a sale. If you list the products that your competitors offer, then you can create a scorecard that helps your sales organization present data to potential customers about how your products provide benefits that your competitors cannot meet.

> Note
> To be able to add the products of your competitors to competitor records, you must customize the product catalog to also include products that are sold by your competitors.

1. In the Navigation Pane, click **Sales**, and then click **Competitors**.
2. In the list of competitors, open the competitor record that you want to add products to.
3. Under **Common**, click **Products**.
4. In the **Records** group, click **Add Existing Product**.
5. In the **Look Up Records** dialog box, search for and select the products that you want to add to the competitor record, and then click **OK**.
6. Click the **Competitor** tab. Click **Save** or **Save and Close**.

> Note
> To remove products from a competitor record, follow steps 1, 2, and 3 to navigate to the appropriate area. Select the products that you want to remove. In the **Records** group, **Remove**. In the confirmation message, click **OK**. Close the record.

Related Topics

Work with Competitor Records 322
Find Things 9
Competing for Customers 322

Add or remove opportunities for a competitor

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Sales Permissions

Adding existing opportunities to a competitor record helps you track other companies who are competing against you for a potential sale. If you determine that the competitor is no longer a threat to making the sale with the associated opportunity, then you can remove that opportunity from the competitor without deleting the opportunity from Microsoft Dynamics CRM.

1. In the Navigation Pane, click **Sales**, and then click **Competitors**.

2. In the list of competitors, open the competitor you want to add an opportunity to.
3. Under **Sales**, click **Opportunities**.
4. In the **Records** group, click **Add Existing Opportunity**.
5. In the **Look Up Records** dialog box, search for and select the opportunity you want to add to the competitor, and then click **OK**.
6. Click the **Competitor** tab. Click **Save** or **Save and Close**.

Tip

If you cannot locate the opportunity you want to add, you might need to create it. To do this, in the **Look Up Records** dialog box, click **New** and then complete the form.

Note

To remove an opportunity from a competitor, follow steps 1, 2, and 3 above to navigate to the appropriate area. Select the opportunity you want to remove. In the **Records** group, click **Remove**. In the confirmation message, click **OK**.

Related Topics

Work with Competitor Records 322
Find Things 9
Work with Opportunities 310
Managing Opportunities 310
Competing for Customers 322

Add or remove sales literature for a competitor

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Sales Permissions

Adding existing sales literature to a competitor record helps you to track information, such as product or service offerings, about the competitor. You can relate or link a competitor's sales literature that you collect to the competitor record. If the sales literature becomes out-dated or the competitor no longer offers the products, then you can remove the sales literature from the competitor record without deleting the sales literature from Microsoft Dynamics CRM.

1. In the Navigation Pane, click **Sales**, and then click **Competitors**.
2. In the list of competitors, open the competitor record that you want to add sales literature to.
3. Under **Sales**, click **Sales Literature**.
4. In the **Records** group, click **Add Existing Sales Literature**.

5. In the **Look Up Records** dialog box, search for and select the sales literature that you want to add to the competitor, and then click **OK**.
6. Click the **Competitor** tab. Click **Save** or **Save and Close**.

Note

To remove sales literature from a competitor record, follow steps 1, 2, and 3 to navigate to the appropriate area. Select the sales literature that you want to remove. In the **Records** group, click **Remove**. In the confirmation message, click **OK**. Close the form.

Related Topics

Work with Competitor Records 322
Find Things 9
Competing for Customers 322

Add or edit sales literature

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Sales Permissions

1. In the Navigation Pane, click **Sales**, and then click **Sales Literature**.
2. In the **Records** group, click **New**, or open the sales literature record that you want to edit.
3. In the **Title** box, type a title for the sales literature. This field is required.
4. In the **Subject** box, click the **Lookup** button to search for the subject that you want. This field is required. If the subject you want does not appear in the list, contact your system administrator to add it. More information: *Requesting User Interface Changes* (on page 220)
5. In the **Subject Lookup** dialog box, select the subject that you want, and then click **OK**.
6. In the **Employee Contact** box, click the **Lookup** button . In the **Look Up Record** dialog box, select the user record for the employee that you want to associate with the sales literature record, and then click **OK**. The person that you select is typically the person responsible for the creation or maintenance of the sales literature.
7. In the **Type** list, click the sales literature type that most closely matches the description of the sales literature.
8. In the **Expiration Date** box, select or enter a date. For example, if the sales literature is associated with a sale, the date that the sale ends is the expiration date.

   You must enter the date in the format your organization has set for dates. For example, 01/01/2006 or 31.12.2005.

If you omit leading zeros in a date, Microsoft Dynamics CRM will add them automatically. For example, when you type 1/1/06, Microsoft Dynamics CRM will display it as 01/01/2006, if that is the date format of your organization.

9. If the sales literature record is new, click **Save** to continue.
10. In the **Actions** group, click **Add a Sales Attachment**.
11. Enter a title (required field), author name, keywords, and an abstract for your sales attachment.
12. If you want to attach a file to the sales attachment record, click **Browse** to locate the file, and then click **Attach**. Attaching a file might take a few minutes, depending on the size of the file.
13. On the sales attachment form, click **Save and Close**.
14. On the sales literature form, click **Save** or **Save and Close**.

Resolve potential duplicate records.

If the system detects that your record might be a potential duplicate, instead of saving the record, Microsoft Dynamics CRM displays the **Duplicates Detected** dialog box.

1. To open a record to make sure it is a potential duplicate, in the **Potential duplicate records** list, double-click the record.
   - If the duplicate-detection rule identified potential duplicate records in other record types, review records from each record type listed.
2. If your new or updated record is not a duplicate, to create the new record, click **Save Record**.

   - OR -

   If your new or updated record is a duplicate, to cancel your changes, click **Cancel**.

Notes

- If you enter a duplicate record within a few minutes of entering the first record, Microsoft Dynamics CRM will not detect the duplicate record. The matchcodes for new and updated records are created every five minutes, rather than as a record is created.
- Duplicate detection can take place only if duplicate detection is enabled in **Duplicate Detection Settings** and if at least one duplicate-detection rule exists for the record type. More information: *Avoiding Duplicate Records* (on page 69)

Tip

Although you cannot attach sales literature records directly to e-mail activities and send them to customers, you can save the file that is attached to a sales attachment record to your desktop and then attach it to the outgoing e-mail.

Related Topics

Competing for Customers 322

Requesting User Interface Changes 220

Add or remove products

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Sales Permissions

If you develop sales literature to support your products, you can link the two types of records. When you are selling a particular product, you will know what information is available about the product.

1. In the Navigation Pane, click **Sales**, and then click **Sales Literature**.
2. In the list of sales literature, open the sales literature you want to add products to.
3. Under **Common**, click **Products**.
4. In the **Records** group, click **Add Existing Product**.
5. In the **Look Up Records** dialog box, search for and select the products you want to add to the sales literature, and then click **OK**.
6. Click the **Sales Literature** tab. Click **Save** or **Save and Close**.

Notes

- To remove products from sales literature, follow steps 1, 2, and 3 to navigate to the appropriate area. Select the products you want to remove. In the **Records** group, click **Remove**. In the confirmation message, click **OK**.
- When you add or remove a product from a sales literature record, both records are updated to reflect the association between them.

Related Topics

Find Things....9
Competing for Customers....322

Add or remove competitors

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Sales Permissions

You can add a known competitor to a sales literature record to help you track other companies who are competing against you and your products or services. If you determine that the competitor you have associated with the sales literature is no longer a threat to making the sale, you can disassociate that competitor from the sales literature without deleting the competitor from Microsoft Dynamics CRM.

1. In the Navigation Pane, click **Sales**, and then click **Sales Literature**.
2. In the list of sales literature, open the sales literature to which you want to add competitors.

3. Under **Sales**, click **Competitors**.
4. In the **Records** group, click **Add Existing Competitor**.
5. In the **Look Up Records** dialog box, locate and select the competitors, and then click **OK**.
6. Click the **Sales Literature** tab. Click **Save** or **Save and Close**.

Notes

- To remove competitors from sales literature, follow steps 1, 2, and 3 above to navigate to the appropriate area. Select the competitors you want to remove. In the **Records** group, click **Remove**. In the confirmation message, click **OK**.
- When you add or remove a competitor from a sales literature record, both records are updated to reflect the association between them.

Related Topics

Work with Competitor Records 322
Competing for Customers 322

Document Form

Use this form to create a sales attachment for a sales literature record and to describe the sales attachment. You can also use this form to attach a file to the sales attachment record.

Add or remove documents

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Sales Permissions

You can add sales attachments to your sales literature records.

1. In the Navigation Pane, click **Sales**, and then click **Sales Literature**.
2. In the list of sales literature, open the sales literature record that you want.
3. In the **Actions** group, click **Add a Sales Attachment**.
4. Enter a title (required field), author name, keywords, and an abstract for your sales attachment.

   Tip

   The author name and keywords can help you find the attachment later.
5. If you want to attach a file to the sales attachment record, click **Browse** to locate the file, and then click **Attach**. Attaching a file might take a few minutes, depending on the size of the file.
6. Click **Save** or **Save and Close**.
7. On the **Sales Literature** form, click **Save and Close**.

Tip

Although you cannot attach sales literature records directly to e-mail activities and send them to customers, you can save the file that is attached to a sales attachment record to your desktop and then attach it to the outgoing e-mail.

Note

To remove attachments from a sales literature record, follow steps 1 and 2 to navigate to the appropriate area. Under **Common**, click **Sales Attachments**. Select the attachments that you want to remove. On the Actions toolbar, click the **Delete** button . In the confirmation message, click **OK**. Close the form.

Related Topics

Document Form 331

Competing for Customers 322

Remove an attachment from a document

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Sales Permissions

If you want to attach a different file to a sales attachment form, you must first remove the existing attached file. Then you can add (or attach) a new file. When you remove the attached file, the references on the sales attachment form, such as the title, author, and keywords, remain.

1. In the Navigation Pane, click **Sales**, and then click **Sales Literature**.
2. In the list of sales literature, open the sales literature record that has the file attachment that you want to remove.
3. Under **Common**, click **Sales Attachments**.
4. Open the sales attachment record that contains the file attachment that you want to remove, and then click **Remove**.
5. In the confirmation message, click **OK**.
6. Click **OK**.
7. Click **Save** or **Save and Close**.

Related Topics

Document Form..... 331

Competing for Customers 322

About goals

You set the goals for your organization. In Microsoft Dynamics CRM, you can track these goals using any metric that measures the performance of your team. For example, you can track things like sales revenue for a territory, the number of sales calls made, the number of leads created, or the number of product units sold.

Typically, a company sets its overall goals using a top-down forecast based on things such as market research, budget planning, and historical performance. In Microsoft Dynamics CRM, you create the overall goals as parent goals and assign them to the sales managers who have the responsibility for achieving them. You then create child goals that you assign to individuals, teams, organizations, territories, and product lines. These child goals roll up into the overall goals for a specified metric.

For example, you could set as a parent goal that your organization adds a certain number of sales leads during the third quarter of the fiscal year. Then, you set child goals that you assign to territories, sales teams, or individuals for their portion of the overall parent goal. Microsoft Dynamics CRM tracks these child goals separately, with each child goal contributing to the parent goal.

In Microsoft Dynamics CRM, you can easily plan and set goals for every level of your organization. You can view the actual and in-progress results in a scheduled rollup or whenever you want. To effectively plan and set goals in Microsoft Dynamics CRM, use the following information:

- Goal hierarchy
- Setting goal metrics
- Defining rollup queries
- Setting targets
- Time periods for goals
- Monitoring goals
- Goals and security roles

Work with Goals

Create or edit a goal

Can I do this task?

This task requires a manager, vice president, CEO-Business Manager, System Administrator, or System Customizer security role or equivalent permissions. More information about specific permissions and performing this task while offline: Sales Permissions

1. In the Navigation Pane, click **Sales**, and then click **Goals**.
2. In the **Records** group, click **New**.

   - OR -

   To edit a goal, select the goal that you want, and then click **Edit**.
3. Under **General**, enter information or observe any noted restrictions or requirements as needed:

- **Name**

  You must enter a name that is between 1 and 100 characters. The name should be meaningful and unique.

- **Parent Goal**

  If you are creating a child goal, click the **Lookup** button and select the parent goal associated with this goal.

- **Goal Owner**

  You must click the **Lookup** button and select the user or team who will own this goal.

- **Goal Metric**

  You must click the **Lookup** button and select the metric for this goal. You can also click **New** in the **Look Up Record** dialog box and create a new goal metric for this goal.

- **Manager**

  You must click the **Lookup** button and select the manager for this goal.

4. Under **Information**, click **Time Period**, and then enter information or observe any noted restrictions or requirements as needed:

   - **Goal Period Type**

     Select whether this goal is for a **Fiscal Period** that is defined by your organization or for a **Custom Period** that you can define specifically for this goal.

   - **Fiscal Period**

     If you selected **Fiscal Period** as the **Goal Period Type**, you must select a fiscal quarter from the list.

   - **Fiscal Year**

     If you selected **Fiscal Period** as the **Goal Period Type**, you must select a fiscal year from the list.

   - **From**

     If you selected **Custom Period** as the **Goal Period Type**, you must enter or select a start date for the custom period.

   - **To**

     If you selected **Custom Period** as the **Goal Period Type**, you must enter or select an end date for the custom period.

5. Under **Information**, click **Targets**, and then enter the value for this goal. The target type depends on the **Amount Data Type** selected for the goal metric that you chose for this goal. You will see one of the following fields:

   - **Target (Decimal)**

     You must enter a decimal value for the goal target. This field is available if the goal **Metric Type** is **Amount** and the **Amount Data Type** is **Decimal**.

   - **Target (Money)**

You must type a monetary value for the goal target. This field is available if the goal **Metric Type** is **Amount** and the **Amount Data Type** is **Money**.

- **Target (Integer)**

  You must type a numeric value for the goal target. This field is available if the goal **Metric Type** is **Amount** and the **Amount Data Type** is **Integer** or if the goal **Metric Type** is **Count**.

If the goal metric you are using has **Track Stretch Target** selected, you will also see one of the following fields:

- **Stretched Target (Decimal)**

  You must enter a decimal value for the goal stretch target. This field is available if the goal **Metric Type** is **Amount** and the **Amount Data Type** is **Decimal**.

- **Stretched Target (Money)**

  You must type a monetary value for the goal stretch target. This field is available if the goal **Metric Type** is **Amount** and the **Amount Data Type** is **Money**.

- **Stretched Target (Integer)**

  You must type a numeric value for the goal stretch target. This field is available if the goal **Metric Type** is **Amount** and the **Amount Data Type** is **Integer** or if the goal **Metric Type** is **Count**.

6. Under **Information**, click **Child Goals**, and then select one or more child goals for this goal.
7. Under **Information**, click **Actuals**, and then enter information or observe any noted restrictions or requirements as needed:

   - **Actual (Money)**

     If the goal metric for this goal uses **Money** as the **Amount Data Type**, this field shows the total amount of money achieved towards the goal as of the last rolled up date.

   - **In-progress (Money)**

     If the goal metric for this goal uses as **Money** the **Amount Data Type**, this field shows the amount of money achieved towards the goal since the last time the actuals were calculated.

   - **Percentage Achieved**

     If the goal metric is **Decimal** or **Integer**, this field shows the percentage of the goal that is complete as of the last rolled up date.

   - **Last Rolled Up Date**

     This field shows the last date and time that the actuals were recalculated.

8. Under **Information**, click **Goal Criteria**, and then enter the goal criteria you want to use for this goal:

   - **Roll Up Only From Child Goals**

     If you want to limit the data used for the roll up to only child goals, click **Yes**. To allow other data to be used for the roll ups, click **No**.

   - **Record Set for Rollup**

If you want to limit the records that can be included in the roll up to only those records owned by the goal owner, select **Owned by goal owner**. To allow all records to be included in the roll up data, select **All**.

The available rollup queries depend on the type of **Goal Metric** you selected. The rollup query is used to create the actual and in-progress data for the goal.

- **Rollup Query - Actual (Money)**

  Shows the actual data for the goal. This option is available if your goal **Metric Type** is **Amount** and the **Amount Data Type** is **Money**.

- **Rollup Query - In-progress (Money)**

  Shows the in-progress data for the goal. This option is available if your goal **Metric Type** is **Amount** and the **Amount Data Type** is **Money**.

- **Rollup Query - Actual (Integer)**

  Shows the actual data for the goal. This option is available if your goal **Metric Type** is **Amount** and the **Amount Data Type** is **Integer**, or if the goal **Metric Type** is **Count**.

- **Rollup Query - In-progress (Integer)**

  Shows the in-progress data for the goal. This option is available if your goal **Metric Type** is **Amount** and the **Amount Data Type** is **Integer**.

9. Under **Information**, click **Notes and Activities**, and then enter any notes for this goal.
10. Click **Save** or **Save and Close**.

Deactivate a goal

A goal is automatically activated when you create it. However, you can close a goal whose time period has completed or which you no longer want to use. You cannot edit a closed goal. However, you can still can still share and assign closed goals.

1. In the Navigation Pane, click **Sales**, and then click **Goals**.
2. Select the goal you want to close.
3. In the **Records** group, click **Close Goal**.
4. In the **Confirm Closing Goal** dialog box, in the **Status** list, click the status to apply to the inactive goal.
5. Click **OK**.

You can delete a goal when you no longer need it. A goal does not have to be inactive to be deleted.

Can I do this task?

This task requires a manager, vice president, CEO-Business Manager, System Administrator, or System Customizer security role or equivalent permissions. More information about specific permissions and performing this task while offline: Sales Permissions

1. In the Navigation Pane, click **Sales**, and then click **Goals**.
2. Select the goal, or multiple goals, that you want to delete.

3. In the **Records** group, click **Delete**.
4. When the confirmation message appears, click **OK**.

Notes

- When you delete a goal, the deletion cannot be undone.
- When you delete a goal, any child goals for that goal will remain. However, the **Parent Goal** field in those goals will be empty.
- Goal metrics that are used by a deleted goal will not be affected.

Specify targets for a goal

The target for a goal includes all the targets set for child goals that roll up into the parent goal.

Can I do this task?

This task requires a manager, vice president, CEO-Business Manager, System Administrator, or System Customizer security role or equivalent permissions. More information about specific permissions and performing this task while offline: Sales Permissions

1. In the Navigation Pane, click **Sales**, and then click **Goals**.
2. In the **Records** group, click **New**.

   - OR -

   To edit a goal, select the goal that you want, and then click **Edit**.
3. Under **Information**, click **Targets**, and then enter the value for this goal. The target type depends on the **Amount Data Type** selected for the goal metric that you chose for this goal. You will see one of the following fields:

   - **Target (Decimal)**

     You must enter a decimal value for the goal target. This field is available if the goal **Metric Type** is **Amount** and the **Amount Data Type** is **Decimal**.
   - **Target (Money)**

     You must type a monetary value for the goal target. This field is available if the goal **Metric Type** is **Amount** and the **Amount Data Type** is **Money**.
   - **Target (Integer)**

     You must type a numeric value for the goal target. This field is available if the goal **Metric Type** is **Amount** and the **Amount Data Type** is **Integer** or if the goal **Metric Type** is **Count**.

   If the goal metric you are using has **Track Stretch Target** selected, you will also see one of the following fields:

   - **Stretched Target (Decimal)**

     You must enter a decimal value for the goal stretch target. This field is available if the goal **Metric Type** is **Amount** and the **Amount Data Type** is **Decimal**.
   - **Stretched Target (Money)**

You must type a monetary value for the goal stretch target. This field is available if the goal **Metric Type** is **Amount** and the **Amount Data Type** is **Money**.

- **Stretched Target (Integer)**

  You must type a numeric value for the goal stretch target. This field is available if the goal **Metric Type** is **Amount** and the **Amount Data Type** is **Integer** or if the goal **Metric Type** is **Count**.

4. Click **Save** or **Save and Close**.

Roll up data for goals

The data that rolls up for your goals is based on the goal criteria and rollup queries that are associated with the goal.

Can I do this task?

This task requires a manager, vice president, CEO-Business Manager, System Administrator, or System Customizer security role or equivalent permissions. More information about specific permissions and performing this task while offline: Sales Permissions

1. In the Navigation Pane, click **Sales**, and then click **Goals**.
2. Select the goal whose data you want to roll up.
3. In the **Actions** group, click **Recalculate**.

   The values of the actuals are recalculated. In the grid, you can see the recalculated values in the **Percentage Achieved**, **Actual**, and **In-Progress** columns. If you open the goal, under **Actuals**, you can see the **Last Rolled Up Date** field, which shows the date when the actuals data was last recalculated.

Add a child goal to a goal

Can I do this task?

This task requires a manager, vice president, CEO-Business Manager, System Administrator, or System Customizer security role or equivalent permissions. More information about specific permissions and performing this task while offline: Sales Permissions

Goals can have a parent-child relationship. A child goal contributes its data to its parent goal when you roll up the data for the parent goal. The parent goal and child goal must have the same goal metric and time period.

You can add a child goal to a goal in different ways.

1. In the Navigation Pane, click **Sales**, and then click **Goals**.
2. In the **Records** group, click **New**.

   - OR -

   To edit a goal, select the goal that you want, and then click **Edit**.

3. In the Goal form, do one of the following:

   Add a new goal as a child goal

You can only add a child goal to a goal that has been saved. If you are creating a new goal, you must save it first before you can add child goals.

4. Click the field under **Child Goals**.
5. In the **Records** group, click **Add New Goal**.
6. In the **Goal** form, under **General**, enter information or observe any noted restrictions or requirements as needed:

   - **Name**

     You must enter a name that is between 1 and 100 characters. The name should be meaningful and unique.

     Parent Goal The parent goal is selected automatically to be the goal from which you created the child goal.

     Goal Owner You must click the **Lookup** button and select the user or team who will own this goal.

     Goal Metric The goal metric is selected automatically and matches the goal metric set for the parent goal. You cannot change this selection.

     Manager You must click the **Lookup** button and select the manager for this goal.
7. Under **Information**, click **Goal Criteria**, and edit the rollup criteria for the child goal.
8. Click **Save**, **Save and Close**, or, to create another child goal, **Save and New**.

Add an existing goal as a child goal

You can only add a child goal to a goal that has been saved. If you are creating a new goal, you must save it first before you can add child goals.

9. Click the field under **Child Goals**.
10. In the **Records** group, click **Add Existing Goal**.
11. In the **Look Up Records** dialog box, select one or more goals you want to add as a child goal.
12. Click **OK**.

Associate a child goal to a parent goal

When you create a new goal, you can make it a child goal by selecting an existing goal to be its parent goal.

13. Under **Information**, click **General**.
14. In the **Parent Goal** list, click the **Lookup** button .
15. In the **Look Up Records** dialog box, select a parent goal for this goal, and then click **OK**.
16. Set other properties for the goal as appropriate.
17. Click **OK**.
18. Click **Save** or **Save and Close**.

Note
The **Metric Type** field and the **Time Period** area automatically inherit their values from the parent goal. If you change these values for the child goal you are creating, you will not be able to save the goal.

Work with Goal Metrics

Work with Rollup Queries

Create or edit a rollup query

Deactivate a rollup query

Delete a rollup query

Completing Sales Transactions

The life of a successful sales transaction typically starts with a draft quote. When the quote is ready, it is activated and sent to the customer. A quote frequently undergoes several revisions between the salesperson and customer before it is accepted.

After the quote is accepted, an order is generated from the quote. The order is used to fulfill the agreement of goods or services that were offered in the quote. Finally, after the order for the goods or services is shipped, an invoice is generated.

In Microsoft Dynamics CRM, quotes, orders, and invoices are considered to be the same item, but in different states of transition.

Your sales force can use the tools and templates in Microsoft Dynamics CRM to create and print quotes, orders, and invoices when they are working either online or offline at a customer site. Additionally, these tools are used to set expiration dates and convert quotes into orders or orders into invoices.

Work with Quotes

Most sales are preceded by a quote or a series of quotes. A quote might go through several revisions before it becomes an order. When you revise a quote by changing products or discounts, those changes are also reflected in your overall sales forecast.

When you first create a quote it has a status of Draft. A quote that is a draft can be changed. When the quote is ready to send to the customer, you change the status of the quote to Active. When you open a quote that is active, the quote information is displayed as read-only and cannot be changed.

Create or edit a quote

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Sales Permissions

1. In the Navigation Pane, click **Sales**, and then click **Quotes**.
2. In the **Records** group, click **New**, or open the record that you want to edit.
3. To edit an active quote, in the **Actions** group of the record, click **Revise**.

   The status of a quote is listed in the **Status** column in the list of quotes.
4. In the **General** section, enter or edit information or observe any noted restrictions or requirements as needed:

   You can use accent marks when you enter data, for example, in a customer's name. Your ability to sort and find information is not affected by these accent marks.

   - **Quote ID**

     This information is automatically created.System administrators can set the auto-numbering format for this ID from the **Administration** page, under **Set Auto-Numbering**.
   - **Revision ID**

     This information is automatically created.The **Revision ID** tracks the number of times an active quote has been revised.
   - **Name**

     Type a name that is between 1 and 100 characters. The name should be meaningful and unique.By default, these records are sorted by Name in the records list.
   - **Potential Customer**

     Search for and select an account or contact.You can click the **Lookup** button to search for and select records.
   - **Currency**

     Select the currency in which the quote will be calculated.
   - **Price List**

     Search for and select the price list that you want. Price lists are created in the product catalog. At least one price list must exist in the product catalog before you can select it.You can click the **Lookup** button to search for records or to select records.

   In the **Totals** area, enter all the information you have available. If you are adding a discount, you can add a percentage discount, a monetary discount amount, or both.

   - **Detail Amount**

     This box is read-only and automatically calculates the sum of all existing quote, order, or invoice line items, which includes products and write-in products.

- **Quote Discount (%)**

  This number represents a percentage of the total amount (not including freight charges) that will be discounted from the total amount. This must be a number between 0.00 and 100.00. You can use a decimal point, but you cannot use a percent sign (%).

- **Quote Discount**

  This number represents a whole monetary amount that will be discounted from the total amount. This must be a number between 0.00 and 100,000,000,000.00. You can use commas and a decimal point, but you cannot use a currency symbol, such as dollar ($), euro (€), or yen (¥).

- **Pre-Freight Amount**

  This box is read-only and automatically calculates a subtotal based on the detail amount and any discounts.

- **Freight Amount**

  This must be a number between 0.00 and 100,000,000,000.00. You can use commas and a decimal point, but you cannot use a currency symbol, such as dollar ($) or euro (€).

- **Total Tax**

  The total tax is calculated when you click **Recalculate** or when you click **Save**.

- **Total Amount**

  The total amount is calculated when you click **Recalculate** or when you click **Save**.

5. Under **Information**, click **Notes**. In the Notes section, click **Add a new note**, and add the information that applies to your record.
6. Click **Save** or **Save and Close**.

   Resolve potential duplicate records.

If the system detects that your record might be a potential duplicate, instead of saving the record, Microsoft Dynamics CRM displays the **Duplicates Detected** dialog box.

1. To open a record to make sure it is a potential duplicate, in the **Potential duplicate records** list, double-click the record.
   - If the duplicate-detection rule identified potential duplicate records in other record types, review records from each record type listed.
2. If your new or updated record is not a duplicate, to create the new record, click **Save Record**.

   - OR -

   If your new or updated record is a duplicate, to cancel your changes, click **Cancel**.

Notes

- If you enter a duplicate record within a few minutes of entering the first record, Microsoft Dynamics CRM will not detect the duplicate record. The matchcodes for new and updated records are created every five minutes, rather than as a record is created.

- Duplicate detection can take place only if duplicate detection is enabled in **Duplicate Detection Settings** and if at least one duplicate-detection rule exists for the record type. More information: *Avoiding Duplicate Records* (on page 69)

  Tips

  - To activate a quote, on the **Quote** form, in the **Actions** group, click **Activate Quote**.
  - You must manually enter the tax amount when you add a product to a quote, order, or invoice. Microsoft Dynamics CRM does not automatically calculate tax for individual products. However, the total tax is calculated automatically based on the sum of the tax amounts for all of the individual products in a quote, order, or invoice.
  - When the **Look Up Records** dialog box is open, if the record you need doesn't exist, click **New**, and create the record.

Related Topics

Work with Quotes 340
Completing Sales Transactions 340
Requesting User Interface Changes 220

Add or remove a contact

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Sales Permissions

1. In the Navigation Pane, click **Sales**, and then click **Quotes**.

   - OR -

   In the Navigation Pane, click **Sales**, and then click **Orders**.

   - OR -

   In the Navigation Pane, click **Sales**, and then click **Invoices**.
2. In the list of quotes, orders, or invoices, open the record that you want to add a contact to.
3. Under **Common**, click **Other Contacts**.
4. In the **Records** group, click **Add Existing Contact**.
5. In the **Look Up Records** dialog box, search for and select the contact records that you want to add to the quote, order, or invoice, and then click **OK**.
6. Click the **Quote**, **Order**, or **Invoice** tab. Click **Save** or **Save and Close**.

   Tip

   If you cannot locate the contact you want to add, you might need to create it. To do this, in the **Look Up Records** dialog box, click **New** and then complete the form.

Note
To remove a contact from a quote, order, or invoice, follow steps 1, 2, and 3 to navigate to the appropriate area. Select the contact or contacts that you want to remove, and then in the **Records** group, click **Remove**. In the confirmation message, click **OK**.

Related Topics

Work with Quotes 340
Work with Orders 352
Work with Invoices 364
Managing Accounts and Contacts 265
Completing Sales Transactions 340

Activate a quote

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Sales Permissions

Before you send your quote to a customer, you must activate it. When you activate a quote, the quote is displayed as read-only.

1. In the Navigation Pane, click **Sales**, and then click **Quotes**.
2. Open the draft quote that you want to activate.
3. In the **Actions** group, click **Activate Quote**.

Related Topics

Work with Quotes 340
Completing Sales Transactions 340

Edit an active quote

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Sales Permissions

When you revise an active quote, a new quote with a new quote ID is created. The original quote is automatically closed and stored in the Microsoft Dynamics CRM database for tracking purposes.

1. In the Navigation Pane, click **Sales**, and then click **Quotes**.

2. Open the record that you want.
3. In the **Actions** group, click **Revise**.
4. In the **General** section, make the changes that you want in the following boxes:

- **Quote ID**

  This information is automatically created.System administrators can set the auto-numbering format for this ID from the **Administration** page, under **Set Auto-Numbering**.

- **Revision ID**

  This information is automatically created. The **Revision ID** tracks the number of times an active quote has been revised.

- **Name**

  Type a name that is between 1 and 100 characters. The name should be meaningful and unique.By default, these records are sorted by Name in the records list.

- **Potential Customer**

  Search for and select an account or contact.You can click the **Lookup** button to search for and select records.

- **Currency**

  Select the currency in which the quote will be calculated.

- **Price List**

  Search for and select the price list that you want. Price lists are created in the product catalog. At least one price list must exist in the product catalog before you can select it.You can click the **Lookup** button to search for records or to select records.

In the **Totals** area, enter all the information you have available. If you are adding a discount, you can add a percentage discount, a monetary discount amount, or both.

- **Quote Discount (%)**

  This number represents a percentage of the total amount (not including freight charges) that will be discounted from the total amount. This must be a number between 0.00 and 100.00. You can use a decimal point, but you cannot use a percent sign (%).

- **Quote Discount**

  This number represents a whole monetary amount that will be discounted from the total amount. This must be a number between 0.00 and 100,000,000,000.00. You can use commas and a decimal point, but you cannot use a currency symbol, such as dollar ($), euro (€), or yen (¥).

- **Freight Amount**

  This must be a number between 0.00 and 100,000,000,000.00. You can use commas and a decimal point, but you cannot use a currency symbol, such as dollar ($) or euro (€).

- **Total Tax**

  The total tax is calculated when you click **Recalculate** or when you click **Save**.

- **Total Amount**

  The total amount is calculated when you click **Recalculate** or when you click **Save**.

5. Under **Information**, click **Notes**. In the Notes section, click **Add a new note**, and add the information that applies to your record.
6. Click **Save** or **Save and Close**.

Related Topics

Work with Quotes 340
Delete Things 19

Create an order from a quote

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Sales Permissions

When your customer has agreed to the terms of your quote, you can convert it to an order. In Microsoft Dynamics CRM, you can only convert an active quote to an order.

Note: After you create an order from a quote, you can no longer revise the quote.

1. In the Navigation Pane, click **Sales**, and then click **Quotes**.
2. Open the active quote that you want.
3. In the **Actions** group, click **Create Order**.
4. In the **Create Order** dialog box, make the changes that you want, and then click **OK**.

   - **Status Reason** and **Date Won**

     The status and date are entered automatically.

   - **Description**

     Add information about the new order.

   - Opportunity record

     If the quote is not linked to an Opportunity record, the options in this section are not available.

     If the quote is linked to an opportunity record, you can update the opportunity record and close it or you can leave the opportunity record intact.

     Close Opportunity is selected by default. To enter the revenue from the opportunity, click **Actual revenue is** and enter the amount. Or, leave the **Calculated from quotes** option selected.

     - OR -

     Select **Don't update opportunity**.

The new order record opens automatically.

5. In the **General** section, make the changes that you want in the following boxes:

- **Order ID**

  This information is automatically created. System administrators can set the auto-numbering format for this ID from the **Administration** page, under **Set Auto-Numbering**.

- **Name**

  Type a name that is between 1 and 100 characters. The name should be meaningful and unique.You can use accent marks when you enter data, for example, in a customer's name. Your ability to sort and find information is not affected by these accent marks.By default, these records are sorted by Name in the records list.

- **Customer**

  You must search for and select an account or contact.You can click the **Lookup** button to search for and select records.

- **Price List**

  Search for and select the price list that you want. Price lists are created in the product catalog. At least one price list must exist in the product catalog before you can select it.You can click the **Lookup** button to search for records or to select records.

In the **Totals** area, enter all the information you have available. If you are adding a discount, you can add a percentage discount, a monetary discount amount, or both.

- **Prices Locked**

  This check box is read-only. You set **Prices Locked** by clicking **Lock Pricing** in the **Actions** group. Alternatively, you disable **Prices Locked** by clicking **Use Current Pricing** in the **Actions** group.

  More information: *Completing Sales Transactions* (on page 340)

- **Order Discount (%)**

  This number represents a percentage of the total amount (not including freight charges) that will be discounted from the total amount. This must be a number between 0.00 and 100.00. You can use a decimal point, but you cannot use a percent sign (%).

- **Order Discount**

  This number represents a whole monetary amount that will be discounted from the total amount. This must be a number between 0.00 and 100,000,000,000.00. You can use commas and a decimal point, but you cannot use a currency symbol, such as dollar ($), euro (€), or yen (¥).

- **Freight Amount**

  This must be a number between 0.00 and 100,000,000,000.00. You can use commas and a decimal point, but you cannot use a currency symbol, such as dollar ($) or euro (€).

- **Total Tax**

  The total tax is calculated when you click **Recalculate** or when you click **Save**.

- **Total Amount**

The total amount is calculated when you click **Recalculate** or when you click **Save**.

6. In the **Shipping** section, enter all the information you have available and observe any noted restrictions or requirements.

   You must enter the date in the format your organization has set for dates. For example, 01/01/2006 or 31.12.2005.

   If you omit leading zeros in a date, Microsoft Dynamics CRM will add them automatically. For example, when you type 1/1/06, Microsoft Dynamics CRM will display it as 01/01/2006, if that is the date format of your organization.

7. In the **Addresses** section, enter all the information that you have available in the following sections:

   - **Bill To Address**

     Enter the address where the billing information will be sent.

   - **Ship To Address**

     Enter the address information to ship the items to the customer. Select **Will Call** if the customer will pick up the items.

     To look up the **Bill To Address** or **Ship To Address** information, follow these steps:

     1. In the **Actions** group, click **Look Up Address**.
     2. In the **Look Up Address** dialog box, select the **Bill To Address** check box, the **Ship To Address** check box, or both.
     3. Click the **Lookup** button.
     4. In the list of records, select the record you want, and then click **OK**.

8. In the **Administration** section, enter the information or observe any noted restrictions or requirements as needed:

   - **Owner**

     This box is filled automatically with the name of the user who is creating the record. You can click the **Lookup** button to search for other records.

   - **Status Reason**

     Select the status of the item.

   - **Source Campaign**

     The campaign record that appears in this field is automatically assigned when you convert a quote associated with a campaign into an order.

   - **Opportunity**

     Select an opportunity if you want to associate this item with an opportunity.

   - **Quote**

     Select a quote if you want to associate this order with a quote.

9. Under **Information**, click **Notes**. In the Notes section, click **Add a new note**, and add the information that applies to your record.

10. Click **Save** or **Save and Close**.

    Resolve potential duplicate records.

If the system detects that your record might be a potential duplicate, instead of saving the record, Microsoft Dynamics CRM displays the **Duplicates Detected** dialog box.

1. To open a record to make sure it is a potential duplicate, in the **Potential duplicate records** list, double-click the record.
   - If the duplicate-detection rule identified potential duplicate records in other record types, review records from each record type listed.
2. If your new or updated record is not a duplicate, to create the new record, click **Save Record**.

   - OR -

   If your new or updated record is a duplicate, to cancel your changes, click **Cancel**.

Notes

- If you enter a duplicate record within a few minutes of entering the first record, Microsoft Dynamics CRM will not detect the duplicate record. The matchcodes for new and updated records are created every five minutes, rather than as a record is created.
- Duplicate detection can take place only if duplicate detection is enabled in **Duplicate Detection Settings** and if at least one duplicate-detection rule exists for the record type. More information: *Avoiding Duplicate Records* (on page 69)

  Tip
  When the **Look Up Records** dialog box is open, if the record you need doesn't exist, click **New**, and create the record.

Related Topics

Work with Quotes 340
Completing Sales Transactions 340
Requesting User Interface Changes 220

Close an active quote

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Sales Permissions

Important: You cannot edit a closed quote record.

1. In the Navigation Pane, click **Sales**, and then click **Quotes**.
2. Open the active quote that you want to close.
3. In the **Actions** group, click **Close Quote**.

4. Enter the following information:

   - **Status Reason**

     Select the status of the item. The choices available by default are **Lost**, **Canceled**, and **Revised**.

   - **Close Date**

     Enter the date that the quote is closed.

   - **Description**

     Enter additional details about why the quote is closed.

   - **Create a revised quote**

     If you are closing the quote because you need to create a new, revised quote, select this option.

     - OR -

     Do not revise this quote

     If you do not want to create a revised quote, select this option.

     - **Close the associated opportunity**

       If this quote is associated with an opportunity, you can select **Close the associated opportunity** to close the opportunity.

Related Topics

Work with Quotes 340
Completing Sales Transactions 340

Quote Product Form

Use this form to add a product to a quote.

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Sales Permissions

1. In the Navigation Pane, click **Sales**, and then click **Quotes**.

   - OR -

   In the Navigation Pane, click **Sales**, and then click **Orders**.

2. Open the quote or order that you want to add a product to.
3. In the Navigation Pane, under **Common**, click **Products**.
4. Under **List Tools**, on the **Quote Products** tab, in the **Records** group, click **Add New Quote Product**.

Note

To add products to a quote, the status of the quote must be **Draft**.

- OR -

Under **List Tools** on the **Order Products** tab, in the **Records** group, click **Add New Order Product**.

5. In the form, you enter information in the following boxes or observe any noted restrictions or requirements as needed:

   - **Select Product**

     To use an existing product, leave the **Existing** option selected.

     If you are using an existing product, click the **Lookup** button to search for and add a product.

     - OR -

     To create a write-in product, click **Write-In**, and then type the name of the product.

   Note

   The available options and fields change depending upon whether you choose an existing or write-in product.

   - **Unit**

     Search for and select a unit.

   - **Pricing**

     Select the pricing option. By default, Microsoft Dynamics CRM will use the price that is listed in the product catalog. To override the price, click **Override Price**. If you choose to override the price, you can specify a price that you want to charge for each unit of the product.

   - **Quantity**

     You must enter the quantity of the product or service that will be included.

     You can enter numbers between 0.00 and 1,000,000,000.00. You can use a comma and a decimal point. You cannot use a currency symbol, such as the dollar ($), euro (€), or yen (¥).

   - **Manual Discount**

     If you want, you can enter a discount to the product.

     You can enter numbers between 0.00 and 1,000,000,000.00.

     You can use a comma and a decimal point. You cannot use a currency symbol, such as the dollar ($), euro (€), or yen (¥).

   - **Tax**

     If required, enter the appropriate tax amount.

6. Click **Save** or **Save and Close**.

Related Topics

Requesting User Interface Changes 220

Work with Orders

When a customer is ready to purchase a product, you can create an order to record the potential sale.

Create or edit an order

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Sales Permissions

Typically, you convert a quote that is won into an order. However, you can also use Microsoft Dynamics CRM to create an order that does not originate from a quote.

1. In the Navigation Pane, click **Sales**, and then click **Orders**.
2. In the **Records** group, click **New**, or open the record that you want to edit.
3. In the **General** section, enter or edit information or observe any noted restrictions or requirements as needed:

   - **Order ID**

     This information is automatically created.System administrators can set the auto-numbering format for this ID from the **Administration** page, under **Set Auto-Numbering**.

   - **Name**

     Type a name that is between 1 and 100 characters. The name should be meaningful and unique.You can use accent marks when you enter data, for example, in a customer's name. Your ability to sort and find information is not affected by these accent marks.By default, these records are sorted by Name in the records list.

   - **Customer**

     You must search for and select an account or contact.You can click the **Lookup** button to search for and select records.

   - **Currency**

     Select the currency in which the order will be calculated.

   - **Price List**

Search for and select the price list that you want. Price lists are created in the product catalog. At least one price list must exist in the product catalog before you can select it.You can click the **Lookup** button to search for records or to select records.

In the **Totals** area, enter all the information you have available. If you are adding a discount, you can add a percentage discount, a monetary discount amount, or both.

- **Detail Amount**

  This box is read-only and automatically calculates the sum of all existing quote, order, or invoice line items, which includes products and write-in products.

- **Prices Locked**

  This check box is read-only. You set **Prices Locked** by clicking **Lock Pricing** in the **Actions** group. Alternatively, you disable **Prices Locked** by clicking **Use Current Pricing** in the **Actions** group.

  More information: *Completing Sales Transactions* (on page 340)

- **Order Discount (%)**

  This number represents a percentage of the total amount (not including freight charges) that will be discounted from the total amount. This must be a number between 0.00 and 100.00. You can use a decimal point, but you cannot use a percent sign (%).

- **Order Discount**

  This number represents a whole monetary amount that will be discounted from the total amount. This must be a number between 0.00 and 100,000,000,000.00. You can use commas and a decimal point, but you cannot use a currency symbol, such as dollar ($), euro (€), or yen (¥).

- **Freight Amount**

  This must be a number between 0.00 and 100,000,000,000.00. You can use commas and a decimal point, but you cannot use a currency symbol, such as dollar ($) or euro (€).

- **Total Tax**

  The total tax is calculated when you click **Recalculate** or when you click **Save**.

- **Total Amount**

  The total amount is calculated when you click **Recalculate** or when you click **Save**.

4. In the **Shipping** section, enter all the information you have available and observe any noted restrictions or requirements.

   You must enter the date in the format your organization has set for dates. For example, 01/01/2006 or 31.12.2005.

   If you omit leading zeros in a date, Microsoft Dynamics CRM will add them automatically. For example, when you type 1/1/06, Microsoft Dynamics CRM will display it as 01/01/2006, if that is the date format of your organization.

5. In the **Addresses** section, enter all the information that you have available in the following sections:

   - **Bill To Address**

     Enter the address where the billing information will be sent.

- **Ship To Address**

  Enter the address information to ship the items to the customer. Select **Will Call** if the customer will pick up the items.

  To look up the **Bill To Address** or **Ship To Address** information, follow these steps:

  1. In the **Actions** group, click **Look Up Address**.
  2. In the **Look Up Address** dialog box, select the **Bill To Address** check box, the **Ship To Address** check box, or both.
  3. Click the **Lookup** button.
  4. In the list of records, select the record you want, and then click **OK**.

6. In the **Administration** section, enter the information or observe any noted restrictions or requirements as needed:

   - **Owner**

     This box is filled automatically with the name of the user who is creating the record. You can click the **Lookup** button to search for other records.

   - **Status Reason**

     Select the status of the item.

   - **Source Campaign**

     The campaign record that appears in this field is automatically assigned if the order is converted from a quote associated with a campaign. You cannot assign a source campaign to completely new orders.

   - **Opportunity**

     Select an opportunity if you want to associate this item with an opportunity.

   - **Quote**

     Select a quote if you want to associate this order with a quote.

7. Under **Information**, click **Notes**. In the Notes section, click **Add a new note**, and add the information that applies to your record.
8. Click **Save** or **Save and Close**.

Resolve potential duplicate records.

If the system detects that your record might be a potential duplicate, instead of saving the record, Microsoft Dynamics CRM displays the **Duplicates Detected** dialog box.

1. To open a record to make sure it is a potential duplicate, in the **Potential duplicate records** list, double-click the record.
   - If the duplicate-detection rule identified potential duplicate records in other record types, review records from each record type listed.
2. If your new or updated record is not a duplicate, to create the new record, click **Save Record**.

- OR -

If your new or updated record is a duplicate, to cancel your changes, click **Cancel**.

Notes

- If you enter a duplicate record within a few minutes of entering the first record, Microsoft Dynamics CRM will not detect the duplicate record. The matchcodes for new and updated records are created every five minutes, rather than as a record is created.
- Duplicate detection can take place only if duplicate detection is enabled in **Duplicate Detection Settings** and if at least one duplicate-detection rule exists for the record type. More information: *Avoiding Duplicate Records* (on page 69)

Tip
When the **Look Up Records** dialog box is open, if the record you need doesn't exist, click **New**, and create the record.

Note
You must manually enter the tax amount when you add a product to a quote, order, or invoice. Microsoft Dynamics CRM does not automatically calculate tax for individual products. However, the total tax is calculated automatically based on the sum of the tax amounts for all of the individual products in a quote, order, or invoice.

Related Topics

Work with Orders 352
Completing Sales Transactions 340
Requesting User Interface Changes 220

Add or remove a contact

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Sales Permissions

1. In the Navigation Pane, click **Sales**, and then click **Quotes**.

   - OR -

   In the Navigation Pane, click **Sales**, and then click **Orders**.

   - OR -

   In the Navigation Pane, click **Sales**, and then click **Invoices**.
2. In the list of quotes, orders, or invoices, open the record that you want to add a contact to.
3. Under **Common**, click **Other Contacts**.
4. In the **Records** group, click **Add Existing Contact**.

5. In the **Look Up Records** dialog box, search for and select the contact records that you want to add to the quote, order, or invoice, and then click **OK**.
6. Click the **Quote**, **Order**, or **Invoice** tab. Click **Save** or **Save and Close**.

Tip
If you cannot locate the contact you want to add, you might need to create it. To do this, in the **Look Up Records** dialog box, click **New** and then complete the form.

Note
To remove a contact from a quote, order, or invoice, follow steps 1, 2, and 3 to navigate to the appropriate area. Select the contact or contacts that you want to remove, and then in the **Records** group, click **Remove**. In the confirmation message, click **OK**.

Related Topics

Work with Quotes 340
Work with Orders 352
Work with Invoices 364
Managing Accounts and Contacts 265
Completing Sales Transactions 340

Lock or unlock the price for an order or invoice

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Sales Permissions

To determine whether your order or invoice is using Prices Locked, view the **Prices Locked** check box in the **General** section of the Invoice or Order form. If the **Prices Locked** check box is not selected, Use Current Pricing is enabled.

Note that this check box is read-only. You cannot enable or disable Prices Locked by clicking the **Prices Locked** check box in the **General** section.

1. In the Navigation Pane, click **Sales**, and then click **Orders** or **Invoices**.
2. Open the order or invoice that you want.
3. To enable Prices Locked, in the **Actions** group, click **Lock Pricing**.

   - OR -

   To enable Use Current Pricing, in the **Actions** group, click **Use Current Pricing**.

Related Topics

Work with Orders 352
Work with Invoices 364
Completing Sales Transactions 340

Create an invoice from an order

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Sales Permissions

In Microsoft Dynamics CRM, you can quickly generate an invoice based on the information that is in an order.

1. In the Navigation Pane, click **Sales**, and then click **Orders**.
2. Open the record that you want.
3. In the **Actions** group, click **Create Invoice**.
4. In the **General** section, make the changes that you want in the following boxes:

   - **Invoice ID**

     This information is automatically created.System administrators can set the auto-numbering format for this ID from the **Administration** page, under **Set Auto-Numbering**.

   - **Name**

     Type a name that is between 1 and 100 characters. The name should be meaningful and unique.You can use accent marks when you enter data, for example, in a customer's name. Your ability to sort and find information is not affected by these accent marks.By default, these records are sorted by Name in the records list.

   - **Customer**

     You must search for and select an account or contact.You can click the **Lookup** button to search for and select records.

   - **Currency**

     Select the currency in which the invoice will be calculated.

   - **Price List**

     Search for and select the price list that you want. Price lists are created in the product catalog. At least one price list must exist in the product catalog before you can select it.You can click the **Lookup** button to search for records or to select records.

   In the **Totals** area, enter all the information you have available. If you are adding a discount, you can add a percentage discount, a monetary discount amount, or both.

- **Prices Locked**

  This check box is read-only. You set **Prices Locked** by clicking **Lock Pricing** in the **Actions** group. Alternatively, you disable **Prices Locked** by clicking **Use Current Pricing** in the **Actions** group.

  More information: *Completing Sales Transactions* (on page 340)

- **Invoice Discount (%)**

  This number represents a percentage of the total amount (not including freight charges) that will be discounted from the total amount. This must be a number between 0.00 and 100.00. You can use a decimal point, but you cannot use a percent sign (%).

- **Invoice Discount**

  This number represents a whole monetary amount that will be discounted from the total amount. This must be a number between 0.00 and 100,000,000,000.00. You can use commas and a decimal point, but you cannot use a currency symbol, such as dollar ($), euro (€), or yen (¥).

- **Pre-Freight Amount**

  This box is read-only and automatically calculates a subtotal based on the detail amount and any discounts.

- **Freight Amount**

  This must be a number between 0.00 and 100,000,000,000.00. You can use commas and a decimal point, but you cannot use a currency symbol, such as dollar ($) or euro (€).

- **Total Tax**

  The total tax is calculated when you click **Recalculate** or when you click **Save**.

- **Total Amount**

  The total amount is calculated when you click **Recalculate** or when you click **Save**.

5. In the **Shipping** section, enter all the information you have available and observe any noted restrictions or requirements.

   You must enter the date in the format your organization has set for dates. For example, 01/01/2006 or 31.12.2005.

   If you omit leading zeros in a date, Microsoft Dynamics CRM will add them automatically. For example, when you type 1/1/06, Microsoft Dynamics CRM will display it as 01/01/2006, if that is the date format of your organization.

6. In the **Addresses** section, enter all the information that you have available in the following sections:

   - **Bill To Address**

     Enter the address where the billing information will be sent.

   - **Ship To Address**

     Enter the address information to ship the items to the customer. Select **Will Call** if the customer will pick up the items.

     To look up the **Bill To Address** or **Ship To Address** information, follow these steps:

     1. In the **Actions** group, click **Look Up Address**.

2. In the **Look Up Address** dialog box, select the **Bill To Address** check box, the **Ship To Address** check box, or both.
3. Click the **Lookup** button.
4. In the list of records, select the record you want, and then click **OK**.

7. In the **Administration** section, enter the information or observe any noted restrictions or requirements as needed:
   - **Owner**

     This box is filled automatically with the name of the user who is creating the record. You can click the **Lookup** button to search for other records.
   - **Status Reason**

     Select the status of the item.
   - **Opportunity**

     Select an opportunity if you want to associate this item with an opportunity.
   - **Order**

     Select an order if you want to associate this invoice with an order.
8. Under **Information**, click **Notes**. In the Notes section, click **Add a new note**, and add the information that applies to your record.
9. Click **Save** or **Save and Close**.

   Resolve potential duplicate records.

If the system detects that your record might be a potential duplicate, instead of saving the record, Microsoft Dynamics CRM displays the **Duplicates Detected** dialog box.

1. To open a record to make sure it is a potential duplicate, in the **Potential duplicate records** list, double-click the record.
   - If the duplicate-detection rule identified potential duplicate records in other record types, review records from each record type listed.
2. If your new or updated record is not a duplicate, to create the new record, click **Save Record**.

   - OR -

   If your new or updated record is a duplicate, to cancel your changes, click **Cancel**.

Notes

- If you enter a duplicate record within a few minutes of entering the first record, Microsoft Dynamics CRM will not detect the duplicate record. The matchcodes for new and updated records are created every five minutes, rather than as a record is created.
- Duplicate detection can take place only if duplicate detection is enabled in **Duplicate Detection Settings** and if at least one duplicate-detection rule exists for the record type. More information: *Avoiding Duplicate Records* (on page 69)

Tip

When the **Look Up Records** dialog box is open, if the record you need doesn't exist, click **New**, and create the record.

Related Topics

Work with Orders 352
Completing Sales Transactions 340
Requesting User Interface Changes 220

Close an order

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Sales Permissions

You close an order by either fulfilling the order or canceling the order. Products or services that are shipped are fulfilled. Conversely, products or services that are not shipped should be canceled.

1. In the Navigation Pane, click **Sales**, and then click **Orders**.
2. In the **Orders** list, open the order that you want.
3. If your organization fulfilled the order, in the **Actions** group, click **Fulfill Order**

   - OR -

   If the order is canceled, click **Cancel Order**.
4. In the dialog box, enter information in the following boxes, and then click **OK**:

   - **Status Reason**

     Select the status of the item.

   - **Date Fulfilled** or **Cancel Date**

     Select the date that the order was fulfilled or canceled.

   - **Description**

     Enter a description of the order fulfillment or cancelation.

Important

You cannot update or change an order after it has been closed. Additionally, you cannot update or change an order that has been partially or completely fulfilled.

Related Topics

Work with Orders 352
Completing Sales Transactions 340

Order Product Form

Use this form to add a product to an order.

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Sales Permissions

1. In the Navigation Pane, click **Sales**, and then click **Quotes**.

   - OR -

   In the Navigation Pane, click **Sales**, and then click **Orders**.
2. Open the quote or order that you want to add a product to.
3. In the Navigation Pane, under **Common**, click **Products**.
4. Under **List Tools**, on the **Quote Products** tab, in the **Records** group, click **Add New Quote Product**.

   Note
   To add products to a quote, the status of the quote must be **Draft**.

   - OR -

   Under **List Tools** on the **Order Products** tab, in the **Records** group, click **Add New Order Product**.
5. In the form, you enter information in the following boxes or observe any noted restrictions or requirements as needed:

   - **Select Product**

     To use an existing product, leave the **Existing** option selected.

     If you are using an existing product, click the **Lookup** button to search for and add a product.

     - OR -

     To create a write-in product, click **Write-In**, and then type the name of the product.

   Note
   The available options and fields change depending upon whether you choose an existing or write-in product.

   - **Unit**

     Search for and select a unit.

   - **Pricing**

     Select the pricing option. By default, Microsoft Dynamics CRM will use the price that is listed in the product catalog. To override the price, click **Override Price**. If you choose to override the price, you can specify a price that you want to charge for each unit of the product.

   - **Quantity**

     You must enter the quantity of the product or service that will be included.

You can enter numbers between 0.00 and 1,000,000,000.00. You can use a comma and a decimal point. You cannot use a currency symbol, such as the dollar ($), euro (€), or yen (¥).

- **Manual Discount**

  If you want, you can enter a discount to the product.

  You can enter numbers between 0.00 and 1,000,000,000.00.

  You can use a comma and a decimal point. You cannot use a currency symbol, such as the dollar ($), euro (€), or yen (¥).

- **Tax**

  If required, enter the appropriate tax amount.

6. Click **Save** or **Save and Close**.

Related Topics

Requesting User Interface Changes 220

Add a product to a queue or order

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Sales Permissions

1. In the Navigation Pane, click **Sales**, and then click **Quotes**.

   - OR -

   In the Navigation Pane, click **Sales**, and then click **Orders**.

2. Open the quote or order that you want to add a product to.
3. In the Navigation Pane, under **Common**, click **Products**.
4. Under **List Tools**, on the **Quote Products** tab, in the **Records** group, click **Add New Quote Product**.

   Note
   To add products to a quote, the status of the quote must be **Draft**.

   - OR -

   Under **List Tools** on the **Order Products** tab, in the **Records** group, click **Add New Order Product**.

5. In the form, you enter information in the following boxes or observe any noted restrictions or requirements as needed:

   - **Select Product**

     To use an existing product, leave the **Existing** option selected.

     If you are using an existing product, click the **Lookup** button to search for and add a product.

     - OR -

To create a write-in product, click **Write-In**, and then type the name of the product.

Note

The available options and fields change depending upon whether you choose an existing or write-in product.

- **Unit**

  Search for and select a unit.

- **Pricing**

  Select the pricing option. By default, Microsoft Dynamics CRM will use the price that is listed in the product catalog. To override the price, click **Override Price**. If you choose to override the price, you can specify a price that you want to charge for each unit of the product.

- **Quantity**

  You must enter the quantity of the product or service that will be included.

  You can enter numbers between 0.00 and 1,000,000,000.00. You can use a comma and a decimal point. You cannot use a currency symbol, such as the dollar ($), euro (€), or yen (¥).

- **Manual Discount**

  If you want, you can enter a discount to the product.

  You can enter numbers between 0.00 and 1,000,000,000.00.

  You can use a comma and a decimal point. You cannot use a currency symbol, such as the dollar ($), euro (€), or yen (¥).

- **Tax**

  If required, enter the appropriate tax amount.

6. Click **Save** or **Save and Close**.

Related Topics

Requesting User Interface Changes 220

Cancel Order Form

Use this form to cancel an order.

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Sales Permissions

You close an order by either fulfilling the order or canceling the order. Products or services that are shipped are fulfilled. Conversely, products or services that are not shipped should be canceled.

1. In the Navigation Pane, click **Sales**, and then click **Orders**.

2. In the **Orders** list, open the order that you want.
3. If your organization fulfilled the order, in the **Actions** group, click **Fulfill Order**

   - OR -

   If the order is canceled, click **Cancel Order**.
4. In the dialog box, enter information in the following boxes, and then click **OK**:
   - **Status Reason**

     Select the status of the item.
   - **Date Fulfilled** or **Cancel Date**

     Select the date that the order was fulfilled or canceled.
   - **Description**

     Enter a description of the order fulfillment or cancelation.

Important
You cannot update or change an order after it has been closed. Additionally, you cannot update or change an order that has been partially or completely fulfilled.

Related Topics

Work with Orders 352
Completing Sales Transactions 340

Work with Invoices

When a customer has agreed to the terms of an order for one or more of your products, you can create an invoice to record the upcoming sale.

Use the Closed Activity list

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Sales Permissions

Many record types allow for activities to be associated with them. For example, an opportunity might have an associated phone call activity. When you close any associated activity as completed, that activity shows up in the record history of the associated record. To view the record history, in the record, under **Common**, click **Closed Activities**.

You can do the following in the **Closed Activities** list:

- While the record is in draft form, you can create a new activity for this record by clicking the **New Activity** button. You can no longer do this when the record is activated. Note that even though you create this activity from the **Closed Activities** list, it will be displayed in the **Activities** list while it is active. It will be displayed in the **Closed Activities** list after you set the status to completed.
- You can also do standard tasks such as printing, exporting data, running a report, or assigning. For information about doing those tasks, see the topic What else can I do? More tasks...

The **Closed Activities** list for opportunities, accounts, and contacts includes two lists that help you narrow down the number of completed activities:

- To narrow down the list to a certain time period, such as Last 30 days, click **Filter on**.
- To see completed activities for one particular record, click **Include**, and then select **This Record Only**.
- To create a list of activities that are related to any record associated with the account or contact, select **Related Regarding Records**.

Related Topics

Manage Activities 23

Create or edit an invoice

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Sales Permissions

Typically, you convert an order into an invoice. In Microsoft Dynamics CRM, you can create an invoice that does not originate from an order.

1. In the Navigation Pane, click **Sales**, and then click **Invoices**.
2. In the **Records** group, click **New**, or open the record that you want to edit.
3. In the **General** section, enter or edit information or observe any noted restrictions or requirements as needed:

   - **Invoice ID**

     This information is automatically created.System administrators can set the auto-numbering format for this ID from the **Administration** page, under **Set Auto-Numbering**.

   - **Name**

     Type a name that is between 1 and 100 characters. The name should be meaningful and unique.You can use accent marks when you enter data, for example, in a customer's name. Your ability to sort and find information is not affected by these accent marks.By default, these records are sorted by Name in the records list.

   - **Customer**

You must search for and select an account or contact.You can click the **Lookup** button to search for and select records.

- **Currency**

  Select the currency in which the invoice will be calculated.

- **Price List**

  Search for and select the price list that you want. Price lists are created in the product catalog. At least one price list must exist in the product catalog before you can select it.You can click the **Lookup** button to search for records or to select records.

In the **Totals** area, enter all the information you have available. If you are adding a discount, you can add a percentage discount, a monetary discount amount, or both.

- **Detail Amount**

  This box is read-only and automatically calculates the sum of all existing quote, order, or invoice line items, which includes products and write-in products.

- **Prices Locked**

  This check box is read-only. You set **Prices Locked** by clicking **Lock Pricing** in the **Actions** group. Alternatively, you disable **Prices Locked** by clicking **Use Current Pricing** in the **Actions** group.

  More information: *Completing Sales Transactions* (on page 340)

- **Invoice Discount (%)**

  This number represents a percentage of the total amount (not including freight charges) that will be discounted from the total amount. This must be a number between 0.00 and 100.00. You can use a decimal point, but you cannot use a percent sign (%).

- **Invoice Discount**

  This number represents a whole monetary amount that will be discounted from the total amount. This must be a number between 0.00 and 100,000,000,000.00. You can use commas and a decimal point, but you cannot use a currency symbol, such as dollar ($), euro (€), or yen (¥).

- **Pre-Freight Amount**

  This box is read-only and automatically calculates a subtotal based on the detail amount and any discounts.

- **Freight Amount**

  This must be a number between 0.00 and 100,000,000,000.00. You can use commas and a decimal point, but you cannot use a currency symbol, such as dollar ($) or euro (€).

- **Total Tax**

  The total tax is calculated when you click **Recalculate** or when you click **Save**.

- **Total Amount**

  The total amount is calculated when you click **Recalculate** or when you click **Save**.

4. In the **Shipping** section, enter all the information you have available and observe any noted restrictions or requirements.

You must enter the date in the format your organization has set for dates. For example, 01/01/2006 or 31.12.2005.

If you omit leading zeros in a date, Microsoft Dynamics CRM will add them automatically. For example, when you type 1/1/06, Microsoft Dynamics CRM will display it as 01/01/2006, if that is the date format of your organization.

5. In the **Addresses** section, enter all the information that you have available in the following sections:

   - **Bill To Address**

     Enter the address where the billing information will be sent.

   - **Ship To Address**

     Enter the address information to ship the items to the customer. Select **Will Call** if the customer will pick up the items.

     To look up the **Bill To Address** or **Ship To Address** information, follow these steps:

     1. In the **Actions** group, click **Look Up Address**.
     2. In the **Look Up Address** dialog box, select the **Bill To Address** check box, the **Ship To Address** check box, or both.
     3. Click the **Lookup** button.
     4. In the list of records, select the record you want, and then click **OK**.

6. In the **Administration** section, enter the information or observe any noted restrictions or requirements as needed:

   - **Owner**

     This box is filled automatically with the name of the user who is creating the record. You can click the **Lookup** button to search for other records.

   - **Status Reason**

     Select the status of the item.

   - **Opportunity**

     Select an opportunity if you want to associate this item with an opportunity.

   - **Order**

     Select an order if you want to associate this invoice with an order.

7. Under **Information**, click **Notes**. In the Notes section, click **Add a new note**, and add the information that applies to your record.

8. Click **Save** or **Save and Close**.

   Resolve potential duplicate records.

If the system detects that your record might be a potential duplicate, instead of saving the record, Microsoft Dynamics CRM displays the **Duplicates Detected** dialog box.

1. To open a record to make sure it is a potential duplicate, in the **Potential duplicate records** list, double-click the record.

- If the duplicate-detection rule identified potential duplicate records in other record types, review records from each record type listed.

2. If your new or updated record is not a duplicate, to create the new record, click **Save Record**.

   - OR -

   If your new or updated record is a duplicate, to cancel your changes, click **Cancel**.

Notes

- If you enter a duplicate record within a few minutes of entering the first record, Microsoft Dynamics CRM will not detect the duplicate record. The matchcodes for new and updated records are created every five minutes, rather than as a record is created.
- Duplicate detection can take place only if duplicate detection is enabled in **Duplicate Detection Settings** and if at least one duplicate-detection rule exists for the record type. More information: *Avoiding Duplicate Records* (on page 69)

  Note
  You must manually enter the tax amount when you add a product to a quote, order, or invoice. Microsoft Dynamics CRM does not automatically calculate tax for individual products. However, the total tax is calculated automatically based on the sum of the tax amounts for all of the individual products in a quote, order, or invoice.

  Tip
  When the **Look Up Records** dialog box is open, if the record you need doesn't exist, click **New**, and create the record.

Related Topics

Work with Invoices 364
Completing Sales Transactions 340
Requesting User Interface Changes 220

Add or remove a contact

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Sales Permissions

1. In the Navigation Pane, click **Sales**, and then click **Quotes**.

   - OR -

   In the Navigation Pane, click **Sales**, and then click **Orders**.

   - OR -

   In the Navigation Pane, click **Sales**, and then click **Invoices**.

2. In the list of quotes, orders, or invoices, open the record that you want to add a contact to.
3. Under **Common**, click **Other Contacts**.
4. In the **Records** group, click **Add Existing Contact**.
5. In the **Look Up Records** dialog box, search for and select the contact records that you want to add to the quote, order, or invoice, and then click **OK**.
6. Click the **Quote**, **Order**, or **Invoice** tab. Click **Save** or **Save and Close**.

Tip

If you cannot locate the contact you want to add, you might need to create it. To do this, in the **Look Up Records** dialog box, click **New** and then complete the form.

Note

To remove a contact from a quote, order, or invoice, follow steps 1, 2, and 3 to navigate to the appropriate area. Select the contact or contacts that you want to remove, and then in the **Records** group, click **Remove**. In the confirmation message, click **OK**.

Related Topics

Work with Quotes 340
Work with Orders 352
Work with Invoices 364
Managing Accounts and Contacts 265
Completing Sales Transactions 340

Lock or unlock the price for an order or invoice

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Sales Permissions

To determine whether your order or invoice is using Prices Locked, view the **Prices Locked** check box in the **General** section of the Invoice or Order form. If the **Prices Locked** check box is not selected, Use Current Pricing is enabled.

Note that this check box is read-only. You cannot enable or disable Prices Locked by clicking the **Prices Locked** check box in the **General** section.

1. In the Navigation Pane, click **Sales**, and then click **Orders** or **Invoices**.
2. Open the order or invoice that you want.
3. To enable Prices Locked, in the **Actions** group, click **Lock Pricing**.

   - OR -

   To enable Use Current Pricing, in the **Actions** group, click **Use Current Pricing**.

Related Topics

Work with Orders 352
Work with Invoices 364
Completing Sales Transactions 340

Close an invoice as paid or canceled

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Sales Permissions

You close an invoice either by canceling the invoice or setting the invoice status as paid.

1. In the Navigation Pane, click **Sales**, and then click **Invoices**.
2. Open the record that you want.
3. If the invoice is paid, in the **Actions** group, click **Invoice Paid**.

   - OR -

   If the invoice is canceled, in the **Actions** group, click **Cancel Invoice**.
4. In the **Paid Invoice** or **Cancel Invoice** dialog box, in the **Status Reason** list, click the reason.
5. Click **OK**.

Related Topics

Work with Invoices 364
Work with Quotes 340
Work with Orders 352
Completing Sales Transactions 340

Invoice Product Form

Use this form to add a product to an invoice.

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Sales Permissions

To add a product to an invoice, you must select a price list on the invoice form.

After you have done this, you can add one or more products. The price list is required because Microsoft Dynamics CRM uses the list to calculate the values in the following fields:

- **Price Per Unit**
- **Volume Discount**
- **Manual Discount**
- **Extended Amount**

Values for these fields will be displayed after you save the record.

1. In the Navigation Pane, click **Sales**, and then click **Invoices**.
2. To add a product, in the list of quotes, orders or invoices, open the record that you want.
3. Under **Common**, click **Products**
4. In the **Records** group, click **Add New Invoice Product**.
5. In the **General** section, enter or edit information or observe any noted restrictions or requirements as needed:

   - **Select Product**

     In the **Existing Products** box, click the **Lookup** button to search for and add a product. Or, click **Write In**, and then, in the **Write-In Product** box, type the name of the product that you want to add.

   - **Unit**

     Click the **Lookup** button to search for and add a unit.

   - **Price Per Unit**

     This value is automatically calculated based on the price list associated with the product that you selected. You cannot manually enter this value.

   - **Volume Discount**

     This value is automatically calculated based on the price list associated with the product that you selected. You cannot manually enter this value.

   - **Quantity**

     Enter the number of product items.

     You must enter numbers between 0.00 and 1,000,000,000.00.

     You can use commas and a decimal point. You cannot use a currency symbol, such as the dollar ($), euro (€), or yen (¥).

   - **Amount**

     This field is calculated automatically based on the price per unit, volume discount, and quantity.

   - **Manual Discount**

     If appropriate, enter a discount.

     You must enter numbers between 0.00 and 1,000,000,000.00.

You can use commas and a decimal point. You cannot use a currency symbol, such as the dollar ($), euro (€), or yen (¥).

- **Tax**

  If required, enter the appropriate tax amount.

- **Extended Amount**

  This field is calculated automatically based on the amount, manual discount, and tax.

6. Click **Save** or **Save and Close**.

Important

When you change the **Quantity** field on a product record, the amounts are not updated until the record is saved.

You must click **Recalculate** in the quote, order, or invoice record to update the amount fields.

Notes

- To add a product from the product catalog, you must create at least one unit group, price list, and product. More information: Creating the Product Catalog
- You must manually enter the tax amount when you add a product to a quote, order, or invoice. Microsoft Dynamics CRM does not automatically calculate tax for individual products. However, the total tax is calculated automatically based on the sum of the tax amounts for all of the individual products in a quote, order, or invoice.

Related Topics

Completing Sales Transactions 340

Requesting User Interface Changes 220

Add a product to an invoice

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Sales Permissions

To add a product to an invoice, you must select a price list on the invoice form.

After you have done this, you can add one or more products. The price list is required because Microsoft Dynamics CRM uses the list to calculate the values in the following fields:

- **Price Per Unit**
- **Volume Discount**
- **Manual Discount**
- **Extended Amount**

Values for these fields will be displayed after you save the record.

1. In the Navigation Pane, click **Sales**, and then click **Invoices**.

2. To add a product, in the list of quotes, orders or invoices, open the record that you want.
3. Under **Common**, click **Products**
4. In the **Records** group, click **Add New Invoice Product**.
5. In the **General** section, enter or edit information or observe any noted restrictions or requirements as needed:
   - **Select Product**

     In the **Existing Products** box, click the **Lookup** button to search for and add a product. Or, click **Write In**, and then, in the **Write-In Product** box, type the name of the product that you want to add.
   - **Unit**

     Click the **Lookup** button to search for and add a unit.
   - **Price Per Unit**

     This value is automatically calculated based on the price list associated with the product that you selected. You cannot manually enter this value.
   - **Volume Discount**

     This value is automatically calculated based on the price list associated with the product that you selected. You cannot manually enter this value.
   - **Quantity**

     Enter the number of product items.

     You must enter numbers between 0.00 and 1,000,000,000.00.

     You can use commas and a decimal point. You cannot use a currency symbol, such as the dollar ($), euro (€), or yen (¥).
   - **Amount**

     This field is calculated automatically based on the price per unit, volume discount, and quantity.
   - **Manual Discount**

     If appropriate, enter a discount.

     You must enter numbers between 0.00 and 1,000,000,000.00.

     You can use commas and a decimal point. You cannot use a currency symbol, such as the dollar ($), euro (€), or yen (¥).
   - **Tax**

     If required, enter the appropriate tax amount.
   - **Extended Amount**

     This field is calculated automatically based on the amount, manual discount, and tax.
6. Click **Save** or **Save and Close**.

Important

When you change the **Quantity** field on a product record, the amounts are not updated until the record is saved.

You must click **Recalculate** in the quote, order, or invoice record to update the amount fields.

Notes

- To add a product from the product catalog, you must create at least one unit group, price list, and product. More information: Creating the Product Catalog
- You must manually enter the tax amount when you add a product to a quote, order, or invoice. Microsoft Dynamics CRM does not automatically calculate tax for individual products. However, the total tax is calculated automatically based on the sum of the tax amounts for all of the individual products in a quote, order, or invoice.

Related Topics

Completing Sales Transactions 340

Requesting User Interface Changes 220

Marketing

Planning Campaigns

Campaigns are containers for all of the information, planning tasks, and campaign activities you need to manage for the marketing campaigns. Campaigns include extensive tracking features, including detailed financial information, reports, and multiple marketing lists. Campaigns can also include multiple planning tasks and campaign activities required to coordinate all the resources that are needed for a campaign.

Work with Campaigns and Campaign Templates

Use this list to work with campaigns and campaign templates.

Can I do this task?

This task requires permissions that are found in all default marketing security roles. More information about specific permissions and performing this task while offline: Marketing Permissions

The only difference between campaigns and campaign templates is in how you save the record. You can add planning tasks, campaign activities, marketing lists, sales literature, and products to both campaigns and campaign templates. Use a campaign to plan and track each of your marketing campaigns. Use campaign templates to create reusable groups of planning tasks and campaign activities for similar or recurring marketing campaigns.

Because campaigns serve as containers for the various items you can include in them, there is no need to close a campaign once all of the planning tasks and campaign activities have been completed.

Create or edit a campaign

1. In the Navigation Pane, click **Marketing**, and then click **Campaigns**.
2. In the **Records** group, click **New**.
3. Under **Information**, click **General**, and then enter the information that you have for this campaign. You must enter information in the following boxes:
   - **Name**
   - **Currency**

   Tip

   At a minimum, select a price list to help you determine the cost of your campaign compared to the revenue generated by the campaign.

4. Under **Information**, click **Financials**, and then enter any information that you have available in the following sections:

   - **Budget Allocated**
   - **Estimated Revenue**
   - **Miscellaneous Costs**

     You must enter numbers between 0.00 and 1,000,000,000.00.

   You can use commas and a decimal point. You cannot use a currency symbol, such as the dollar ($), euro (€), or yen (¥).

   Microsoft Dynamics CRM automatically calculates the **Total Cost of Campaign Activities** and **Total Cost of Campaign** values.

5. Under **Information**, click **Notes and Activities**. In the Notes section, click **Add a new note**, and add the information that applies to your record.

6. Click **Save** or **Save and Close**.

   Notes

   - Microsoft Dynamics CRM automatically generates all information that is displayed in the **Administration** section. The name of the user who creates the campaign appears in the **Owner** and **Modified By** boxes.
   - Microsoft Dynamics CRM automatically generates a campaign code when you save the new campaign. Because this code is automatically generated, it cannot be changed after you save the campaign.

Create or edit a campaign template

You can create a campaign template by copying an existing campaign or by creating a completely new campaign template.

1. In the Navigation Pane, click **Marketing**, and then click **Campaigns**.
2. To create a completely new template, in the **Records** group, click **New Template**.

   - OR -

   To copy an existing campaign as a template, click the name of the campaign that you want to copy. In the **Actions** group, click **Copy as Template**.

3. In the campaign template form, enter information as you would for a campaign, and add items such as planning tasks, campaign activities, and marketing lists.
4. Click **Save** or **Save and Close**.

   Note

   If you need to back up your templates, or export them for use in a different implementation of Microsoft Dynamics CRM, you can export them as part of exporting customizations. More information: Export a solution

Related Topics

Work with Campaigns and Campaign Templates 375
Planning Campaigns 375
Understanding Quick Campaigns 382

Add a marketing list, sales literature, or product to a campaign

Can I do this task?

This task requires permissions that are found in all default marketing security roles. More information about specific permissions and performing this task while offline: Marketing Permissions

After you create a campaign, add items that are associated with this campaign. You can add a target marketing list, products, sales literature, and related campaigns.

1. In the Navigation Pane, click **Marketing**, and then click **Campaigns**.
2. Click the name of the campaign to which you want to add a list, product, or sales literature, and then do one of the steps in the following table.

To add	Do this
A marketing list	Under **Marketing**, click **Target Marketing Lists**, and then in the **Records** group, click **Add Existing Marketing List**.
A product	Under **Sales**, click **Target Products**, and then in the **Records** group, click **Add Existing Product**.
Sales literature	Under **Sales**, click **Sales Literature**, and then in the **Records** group, click **Add Existing Sales Literature**.
A related campaign	Under **Marketing**, click **Related Campaigns**, and then in the **Records** group, click **Add Existing Campaign**.

3. In the **Look Up Records** dialog box, in the **Look for** list, select the type of record you want to find.
4. In the **Search** box, type the first few letters of the name of the record to narrow your search, and then click the **Find** button .
5. In the list of records, select the check boxes for the records that you want to add, click **Add**, and then click **OK**.
6. Click **Save** or **Save and Close**.

Note

To verify that the item you selected was added to the campaign, reopen the campaign, and then under **Marketing**, click **Target Marketing Lists**, or under **Sales** click either **Target Products** or **Sales Literature**. The information that you added appears in the list.

Related Topics

Work with Campaigns and Campaign Templates 375
Work with Marketing Lists 389
Planning Campaigns 375

Add a planning task to a campaign

Can I do this task?

This task requires permissions that are found in all default marketing security roles. More information about specific permissions and performing this task while offline: Marketing Permissions

1. In the Navigation Pane, click **Marketing**, and then click **Campaigns**.
2. Click the name of the campaign that you want to add a planning task to.
3. Under **Related**, click **Planning Activities**.
4. Under **List Tools**, on the **Activities** tab, in the **Records** group, click **Add New Activity**, and then click **Task**.
5. In the **Subject** box, enter text that describes the task.

   In the box below, you can add specific details about how to complete the task.
6. If needed, in the **Owner** box, enter a new owner for the record. This box is filled automatically with the name of the user who is creating the record. You can click the **Lookup** button to search for other records.
7. Under **Information**, click **Notes and Activities**. In the Notes section, click **Add a new note**, and add the information that applies to your record.
8. Click **Save** or **Save and Close**.

Related Topics

Work with Campaigns and Campaign Templates 375

Add a campaign activity to a campaign or campaign template

Can I do this task?

This task requires permissions that are found in all default marketing security roles. More information about specific permissions and performing this task while offline: Marketing Permissions

1. In the Navigation Pane, click **Marketing**, and then click **Campaigns**.
2. Click the name of the campaign or campaign template that you want to add an activity to.
3. Under **Related**, click **Campaign Activities**.
4. Under **List Tools**, on the **Campaign Activities** tab, in the **Records** group, click **Add New Campaign Activity**.

   The **Parent Campaign** box is populated with the campaign or campaign template to which you are adding the activity.
5. In the **Channel** list, click the channel for the activity that you are creating.
6. In the **Type** list, click the option that describes the activity.
7. In the **Subject** box, enter text that describes the activity.

   In the box below, you can add specific details about how to complete the task.
8. If needed, specify a new owner for the record in the **Owner** box. Click the **Lookup** button to search for another owner.
9. To select a vendor that is involved in the activity, in the **Outsource Vendors** box, click the **Lookup** button .
10. In the **Scheduled Start** and **Scheduled End** boxes, click the start and end dates for the activity.

    The end date that you select appears in the **Due Date** column in **Activities** in the **Workplace**.
11. In the **Budget Allocated** box, enter the amount designated for the campaign activity.
12. In the **Priority** list, click the appropriate priority level.
13. Under the **Anti-Spam Setting**, enter the number of days that you want to pass before a marketing list member is contacted again.
14. Click **Save**.

Important

After you create a campaign activity, you must distribute the activity. To distribute your new campaign activity, in the **Actions** group, click **Distribute Campaign Activity**.

Notes

- You can only distribute mail merge campaign activities to marketing lists that all contain the same type of record. For example, if one marketing list contains accounts and a second marketing list contains leads, the mail merge campaign activity will fail. Create a separate mail merge campaign activity for each group of marketing lists with the same record type.
- If you have used the **Anti-Spam Setting** option to specify contact restrictions for accounts, contacts, or leads, Microsoft Dynamics CRM applies a date and time stamp to these accounts,

contacts, or leads in the marketing list. You will not be able to distribute activities to these accounts, contacts, or leads for the exact amount of time that you have specified.

Related Topics

Work with Campaigns and Campaign Templates 375
Work with Marketing Lists 389

Create or edit a campaign response

Can I do this task?

This task requires permissions that are found in all default marketing security roles. More information about specific permissions and performing this task while offline: Marketing Permissions

1. In the Navigation Pane, click **Marketing**, and then click **Campaigns**.
2. Click the campaign that you want to add a campaign response to.
3. Under **Related**, click **Campaign Responses**.
4. Under **List Tools**, on the **Campaign Responses** tab, in the **Records** group, click **Add New Campaign Response**.

   - OR -

   In the list of campaign responses, click the name of the campaign response that you want to edit.
5. Under **Information**, click **Campaign Response**.
6. Enter information or observe any noted restrictions or requirements:

   - **Parent Campaign**

     This information is automatically entered based on the name of the campaign you selected to add this response to.

   - **Response Code**

     Select an option from the list that reflects the type of response provided by the customer.

   - **Customer**

     If an existing customer provided the response, then you can link that customer record to the response. To locate and specify a customer, select a record from a filtered list in the **Form Assistant** pane, or click **Lookup** to search for other records. If the customer record does not exist, you can click **New** to create a new customer record.

   - **Outsource Vendor**

     You can specify an account or contact as the vendor who provided the response information. To locate and specify an outsource vendor, select a record from a filtered list in the **Form Assistant** pane, or click **Lookup** to search for other records or to add a new record.

- **Originating Activity**

  You can link the campaign response to an activity, such as a phone call that you or someone else in your organization recorded. To locate and specify an activity, select a record from a filtered list in the **Form Assistant** pane, or click **Lookup** to search for other records.

- **Subject**

  Type in the subject of the campaign response.

- **Owner**

  This box is filled automatically with the name of the user who is creating the record. You can click the **Lookup** button to search for other records.

7. Click **Save** or **Save and Close**.

Tip
You can also create a campaign response from the Activities area. To do this, in the Navigation Pane, click **Workplace**, and then under **My Work**, click **Activities**. On the Actions toolbar, click **New** and then in the **New Activity** dialog box, click **Campaign Response**. If you create a response from this area, you must specify a value for the **Parent Campaign**.

Note
There are four ways to create new campaign responses in Microsoft Dynamics CRM. More information: *Understanding Campaign Responses* (on page 383)

Related Topics

Work with Campaigns and Campaign Templates 375
Work with Campaign Responses 383
Planning Campaigns 375
Importing Data 77

Default marketing reports

The following marketing reports are available:

This topic shows you how to use the different reports. To find more information, when you generate a report, click **Help**, and then click **Help on This Page**.

- Campaign Activity Status Report

  Use this report to track a campaign. The report displays a summary for each campaign activity, including planned and actual time parameters, parent campaign details, and definition status.

- Campaign Comparison Report

  Use this report to identify your most and least successful campaigns. The report compares two campaigns based on parameters such as cost effectiveness and number of responses.

- Campaign Performance Report

  Use this report to track the progress and status of your campaigns. The report provides a detailed view, including all the dates, targets, definitions, responses, and financial returns from each campaign.

If the default reports don't provide the information you need, try creating an Advanced Find search, and exporting the results to Microsoft Office Excel.

Note
This topic documents the list of default reports as they were shipped. If this list differs from the reports that are available to you, contact your report administrator or system administrator for information about the customized reports.

Related Topics

Work with Campaign Responses 383
Work with Campaigns and Campaign Templates 375
Planning Campaigns 375

Understanding Quick Campaigns

You can use a quick campaign to communicate with an ad-hoc list of customers (accounts, contacts, or leads). More information: *Work with Quick Campaigns* (on page 382)

Work with Quick Campaigns

Use a quick campaign to create an activity to communicate with a group of accounts, contacts, leads, or even to a marketing list.

Although you can print or export the quick campaign list and delete quick campaigns that you no longer need, you must select records in other lists to create a new quick campaign.

Caution: Deleting a quick campaign record deletes all of the activities created by the quick campaign, even if those activities were not yet complete.

Concepts:

- *Understanding Quick Campaigns* (on page 382)
- *Create a quick campaign*
- What else can I do? More tasks...

Create Quick Campaign

A privilege required to create a new quick campaign. This privilege is on the **Marketing** tab in **Security Roles**.

Understanding Campaign Responses

In Microsoft Dynamics CRM, campaign responses are records of the communication you receive from potential customers in response to a specific marketing campaign. There are four ways to create campaign responses:

- Record campaign responses manually.
- Convert an existing activity to a campaign response.
- Automatically generate campaign responses.
- Import responses from a file, such as a Microsoft Office Excel workbook.

Capturing campaign responses in Microsoft Dynamics CRM helps to make sure that your team is aware that a customer has responded. By running reports that contain the campaign response data that you have captured in Microsoft Dynamics CRM, you can measure the success of specific activities based on their response rates.

Note
Campaign responses are *records* of the responses you have *received* from potential customers, *not* automated responses back *to* your potential customers. Understanding this difference is especially important when you work with automatically generated campaign responses for e-mail activities.

Work with Campaign Responses

A campaign response is a record of the communication you receive from a potential customer in response to a specific campaign.

Create or edit a campaign response

Can I do this task?

This task requires permissions that are found in all default marketing security roles. More information about specific permissions and performing this task while offline: Marketing Permissions

1. In the Navigation Pane, click **Marketing**, and then click **Campaigns**.
2. Click the campaign that you want to add a campaign response to.
3. Under **Related**, click **Campaign Responses**.
4. Under **List Tools**, on the **Campaign Responses** tab, in the **Records** group, click **Add New Campaign Response**.

   - OR -

   In the list of campaign responses, click the name of the campaign response that you want to edit.
5. Under **Information**, click **Campaign Response**.
6. Enter information or observe any noted restrictions or requirements:

- **Parent Campaign**

  This information is automatically entered based on the name of the campaign you selected to add this response to.

- **Response Code**

  Select an option from the list that reflects the type of response provided by the customer.

- **Customer**

  If an existing customer provided the response, then you can link that customer record to the response. To locate and specify a customer, select a record from a filtered list in the **Form Assistant** pane, or click **Lookup** to search for other records. If the customer record does not exist, you can click **New** to create a new customer record.

- **Outsource Vendor**

  You can specify an account or contact as the vendor who provided the response information. To locate and specify an outsource vendor, select a record from a filtered list in the **Form Assistant** pane, or click **Lookup** to search for other records or to add a new record.

- **Originating Activity**

  You can link the campaign response to an activity, such as a phone call that you or someone else in your organization recorded. To locate and specify an activity, select a record from a filtered list in the **Form Assistant** pane, or click **Lookup** to search for other records.

- **Subject**

  Type in the subject of the campaign response.

- **Owner**

  This box is filled automatically with the name of the user who is creating the record. You can click the **Lookup** button to search for other records.

7. Click **Save** or **Save and Close**.

Tip

You can also create a campaign response from the Activities area. To do this, in the Navigation Pane, click **Workplace**, and then under **My Work**, click **Activities**. On the Actions toolbar, click **New** and then in the **New Activity** dialog box, click **Campaign Response**. If you create a response from this area, you must specify a value for the **Parent Campaign**.

Note

There are four ways to create new campaign responses in Microsoft Dynamics CRM. More information: *Understanding Campaign Responses* (on page 383)

Related Topics

Work with Campaigns and Campaign Templates 375
Work with Campaign Responses..... 383
Planning Campaigns..... 375
Importing Data 77

Reactivate a campaign response

Can I do this task?

This task requires permissions that are found in all default marketing security roles. More information about specific permissions and performing this task while offline: Marketing Permissions

1. In the Navigation Pane, click **Marketing**, and then click **Campaigns**.
2. Open the campaign that contains the campaign response that you want to reactivate.
3. Open the closed campaign response that you want to reactivate.
4. In the **Actions** group, click **Reactivate Campaign Response**.
5. In the confirmation message, click **OK**.
6. Click **Save** or **Save and Close**.

Related Topics

Work with Campaign Responses..... 383
Planning Campaigns..... 375

Copy a campaign response

Can I do this task?

This task requires permissions that are found in all default marketing security roles. More information about specific permissions and performing this task while offline: Marketing Permissions

1. In the Navigation Pane, click **Marketing**, and then click **Campaigns**.
2. Click the campaign that contains the campaign response that you want to copy.
3. Under **Related**, click **Campaign Responses**.
4. Click the campaign response that you want to copy.
5. In the **Actions** group, click **Copy Campaign Response**.

6. In the new campaign response form that opens with the same information as the original campaign response, make any necessary changes, such as changing the subject.
7. Click **Save** or **Save and Close**.

Related Topics

Work with Campaign Responses 383
Planning Campaigns 375

Convert campaign responses to leads or opportunities

You can convert a campaign response to another record, such as a lead, quote, order, or opportunity. You can also use the campaign response to convert an existing lead to an account. Converting a campaign response automatically closes it.

Can I do this task?

This task requires permissions that are found in all default marketing security roles. More information about specific permissions and performing this task while offline: Marketing Permissions

1. In the Navigation Pane, click **Marketing**, and then click **Campaigns**.
2. Click the name of the campaign that contains responses that you want to qualify.
3. Under **Related**, click **Campaign Responses**.
4. Click the individual campaign response that you want to qualify.
5. In the **Actions** group, click **Convert Campaign Response**.
6. In the **Close and Convert the Response** dialog box, click **Close response and convert into a record**, and then do one of the following:
   - To create a new lead record, click **Create New Lead**.
   - To use the campaign response to convert an existing lead to an account or contact record, click **Convert an existing lead**. You can click the **Lookup** button to search for the existing lead.
   - To create an opportunity, quote, or order for an existing customer, click **Create new record for a customer**, and then click the type of new record you want to create. In the **Create new record for a customer** box, click the **Lookup** button to search for and select an existing account or contact record.

     If you do not have a record for the existing customer, you can click **New** in the **Look Up Records** dialog box to create the record now.

Note

By default, the currency for the new record will be selected. To select a different currency, in the **Currency** box, click the **Lookup** button to search for and select another currency.

7. To open the new record, select the **Open newly created records** check box. After you click **OK**, forms for any new leads, quotes, orders, or opportunities open, and you can fill out additional information about each new record.
8. Click **OK**.

Tip

- If you want to view the new records you have created, select the **Open newly created records** check box. After you click **OK**, forms for any new leads, quotes, orders, or opportunities open, and you can fill out additional information about each new record.
- If you want to disqualify the campaign response, you can close it without converting it to another record.

Related Topics

Work with Campaign Responses 383
Planning Campaigns 375

Close a campaign response

You can close a campaign response without converting it to another record.

Can I do this task?

This task requires permissions that are found in all default marketing security roles. More information about specific permissions and performing this task while offline: Marketing Permissions

1. In the Navigation Pane, click **Marketing**, and then click **Campaigns**.
2. Click the campaign that contains responses that you want to close.
3. Under **Related**, click **Campaign Responses**.
4. Click the name of the campaign response that you want to close.
5. In the **Actions** group, click **Close Campaign Response**.
6. Select an appropriate status for the disqualified campaign response, and then click **OK**.

Related Topics

Work with Campaign Responses 383
Planning Campaigns 375

Default marketing reports

The following marketing reports are available:

This topic shows you how to use the different reports. To find more information, when you generate a report, click **Help**, and then click **Help on This Page**.

- *Campaign Activity Status Report* (on page **Error! Bookmark not defined.**)

  Use this report to track a campaign. The report displays a summary for each campaign activity, including planned and actual time parameters, parent campaign details, and definition status.

- *Campaign Comparison Report* (on page 110)

  Use this report to identify your most and least successful campaigns. The report compares two campaigns based on parameters such as cost effectiveness and number of responses.

- *Campaign Performance Report* (on page 111)

  Use this report to track the progress and status of your campaigns. The report provides a detailed view, including all the dates, targets, definitions, responses, and financial returns from each campaign.

If the default reports don't provide the information you need, try creating an Advanced Find search, and exporting the results to Microsoft Office Excel.

Note
This topic documents the list of default reports as they were shipped. If this list differs from the reports that are available to you, contact your report administrator or system administrator for information about the customized reports.

Related Topics

Work with Campaign Responses 383
Work with Campaigns and Campaign Templates 375
Planning Campaigns 375

Creating and Managing Marketing Lists

In Microsoft Dynamics CRM, marketing lists are groups of accounts, contacts, or leads filtered by criteria that you specify. You can associate marketing lists with campaigns, create quick campaigns for the records in a marketing list, and export the members in the marketing list to Microsoft Office Excel.

Depending upon your requirements, you can create two types of marketing lists: static and dynamic.

The members in a static marketing list are unchanging. A dynamic marketing list is based on a dynamic query that retrieves the updated list of members each time you open the dynamic marketing list, create a quick campaign from this marketing list, or distribute a campaign activity for a campaign associated with this marketing list.

Note
Marketing lists can contain only one type of record, such as accounts, contacts, or leads.

Work with Marketing Lists

Marketing lists are lists of accounts, contacts, or leads that match a specific set of criteria.

Create or edit a marketing list - Proc

1. In the Navigation Pane, click **Marketing** or **Sales**, and then click **Marketing Lists**.
2. In the **Records** group, click **New**, or open the marketing list that you want to edit.
3. Under **Information**, click **General**, and specify the information in the following required boxes:
   - **Name**
   - **Member Type**
4. Enter any other information that you have for the list.
   - If you want to prevent members from being added or removed from the list, next to **Locked**, click **Yes**.
   - To specify if you want the members in the marketing list to be static or dynamic, next to **Type**, click **Static** or **Dynamic**, respectively.

     If you click **Dynamic**, the members in the marketing list will change each time you open the marketing list and navigate to the **Marketing List Members** area. If you click **Static**, the members in the marketing list will change only when you manually add or remove members from the list.
5. To add any other information that applies to your marketing list, under **Information**, click **Notes and Activities**, click **Add a new note**, and then enter the information.
6. Click **Save** or **Save and Close**.

Notes

- After you create a marketing list, you cannot change the member type.
- After you create an empty marketing list, you must add marketing list members before you can use the list.
- If you enter a value in the **Cost** box, you must enter a value with commas and decimal points only. Do not enter a currency symbol.

Activate a marketing list

Can I do this task?

This task requires permissions that are found in all default marketing security roles. More information about specific permissions and performing this task while offline: Marketing Permissions

Before you can use a marketing list, you must activate it. After you activate it, you can add or remove members, attach a file, create a follow-up activity, use the list in a quick campaign, or add the list to a campaign.

1. In the Navigation Pane, click **Marketing** or **Sales**, and then click **Marketing Lists**.
2. Select the marketing list that you want to activate.
3. In the **Records** group, click **Activate**, and then click **OK**.

Related Topics

Work with Marketing Lists 389
Creating and Managing Marketing Lists 387
Work with Campaigns and Campaign Templates 375
Planning Campaigns 375
Work with Quick Campaigns 382
Understanding Quick Campaigns 382

Add members to a marketing list

Can I do this task?

This task requires permissions that are found in all default marketing security roles. More information about specific permissions and performing this task while offline: Marketing Permissions

1. In the Navigation Pane, click **Marketing** or **Sales**, and then click **Marketing Lists**.
2. Open the marketing list to which you want to add members.
3. Under **Related**, click **Marketing List Members**.
4. Under **List Tools**, on the **Marketing List Members** tab, in the **Actions** group, click **Manage Members**.
5. For a static marketing list, in the **Manage Members** dialog box, click one of the following options, and then click **OK**:

   Use Lookup to add members

   a. In the **Search** box, type the first few letters of the name of the record to narrow your search, and then click the **Find** button .

   b. In the list of records, select the check boxes for the records that you want to add, click **Add**, and then click **OK**.

   Use Advanced Find to add members

   a. Select options to search for list members, and then click **Find**. More information: *Find Things* (on page 9)

   b. To add all the records to the marketing list, click **Add all the members returned by the search to the marketing list**, and then click **Add to Marketing List**.

   c. To add only some records to the list, select the records that you want, click **Add only the selected members to the marketing list**, and then click **Add to Marketing List**.

   - OR -

For a dynamic marketing list, in the **Manage Members** dialog box, specify a search criteria to identify the records to be added, and then click **Use Query**:

Specify the search criteria

d. In the Manage Members dialog box, click **Select**, and then click the field on which you want to search, such as **Account Name** or **City**. You can select fields from the current record type, or from related record types.

The **Related** section of the **Select** list shows the related record types. When you select a related record type, a new line appears with another **Select** list for the related record type.

e. Click **Equals**, and then click a query relational operator.

f. Click **Enter Value**, and then type the value that you want to locate (for example, "Seattle" or "E-mail").

For some values, you can click the **Lookup** button to open the **Select Values** dialog box and select the value you want.

6. Click **Save** or **Save and Close**.

Tip

You can also add members to a marketing list from the Sales area. To do this, in the Navigation Pane, click **Sales**, and then click **Accounts**, **Contacts**, or **Leads**. Next, select the records you want to add to a marketing list, and on the Actions toolbar, click **Actions**, and then click **Add to Marketing List**. Locate and select the marketing list you want to add the records to and then click **OK**. If necessary, you can create a new marketing list from the **Look Up Records** dialog box.

Note

Based on the member type of the list to which you are adding records, a member can be an account, contact, or lead. For example, if you open a leads list, any you can add new leads to the member list, but you cannot add accounts or contacts.

Related Topics

Work with Marketing Lists 389
Find Things 9
Creating and Managing Marketing Lists 387
Working Offline 486

Add or edit members of a static marketing list

Can I do this task?

This task requires permissions that are found in all default marketing security roles. More information about specific permissions and performing this task while offline: Marketing Permissions

1. Open the marketing list to which you want to add new or evaluate and edit the existing members.
2. Under **List Tools**, on the **Marketing List Members** tab, in the **Actions** group, click **Manage Members**.

3. Click the way that you want to search for marketing list members, and then click **OK**.

   - Search records using Lookup.

     a. In the **Search** box, type the first few letters of the name of the record to narrow your search, and then click the **Find** button .

   g. In the list of records, select the check boxes for the records that you want to add, click **Add**, and then click **OK**.

   - OR -

   - Search records using Advanced Find.

If you selected one of the advanced find options, define a search criteria, and depending on the option that you selected in the **Manage Members** dialog box, do one of the following:

Action	**Do this**
Add all the records returned to the list	Click **Add all the members returned by the search to the marketing list**, and then click **Add to Marketing List**.
Add only the selected records to the list	Select the records you want added, click **Add only the selected members to the marketing list**, and then click **Add to Marketing List**.
Remove all the records returned to the list	Click **Remove all the members returned by the search from the marketing list**, and then click **Remove from Marketing List**.
Remove just the selected records from the list	Select the records you want remove, click **Remove only the selected members from the marketing list**, and then click **Remove from Marketing List**.
Keep all the records returned to the list	Select **Keep all the members returned by search in the marketing list**, and then click **Update Marketing List**.
Keep just the selected records from the list	Select the records you want remove, select **Keep only the selected members in the marketing list**, and then click **Update Marketing List**.

Note

Based on the member type of the list to which you are adding records, a member can be an account, contact, or lead. For example, if you open a leads list, any you can add new leads to the member list, but you cannot add accounts or contacts.

Related Topics

Find Things 9

Add or edit members of a dynamic marketing list

Can I do this task?

This task requires permissions that are found in all default marketing security roles. More information about specific permissions and performing this task while offline: Marketing Permissions

1. Open the dynamic marketing list to which you want to add new members or edit the existing members.
2. Under **List Tools**, on the **Marketing List Members** tab, in the **Actions** group, click **Manage Members**.
3. Specify the search criteria.
   a. In the Manage Members dialog box, click **Select**, and then click the field on which you want to search, such as **Account Name** or **City**. You can select fields from the current record type, or from related record types.

      The **Related** section of the **Select** list shows the related record types. When you select a related record type, a new line appears with another **Select** list for the related record type.

   b. Click **Equals**, and then click a query relational operator.

   c. Click **Enter Value**, and then type the value that you want to locate (for example, "Seattle" or "E-mail").

      For some values, you can click the **Lookup** button to open the **Select Values** dialog box and select the value you want.
4. Specify the columns to include in the search results.
   a. Click **Edit Columns**, and then click **Add Columns**.

   b. Select the record type that includes the columns you want to add.

   c. Select the check box next to the columns you want to add. If a column isn't listed, contact your system administrator.

   d. Click **OK**.

   e. The following options are also available:

      - To adjust the width of a column, click the column, click **Change Properties**, select a width, and then click **OK**.
      - To reorder columns, select a column, and use the arrow keys to move it to the left or right.
      - To remove a column, select it, and then click **Remove**.

   f. Click **OK**.
5. Click **Use Query**.

   The records that match the query are added to the dynamic marketing list.

   Note
   Based on the member type of the list to which you are adding records, a member can be an account, contact, or lead. For example, if you open a leads list, any you can add new leads to the member list, but you cannot add accounts or contacts.

Related Topics

Find Things 9

Add members from one marketing list to another marketing list

Can I do this task?

This task requires permissions that are found in all default marketing security roles. More information about specific permissions and performing this task while offline: Marketing Permissions

You can add members from one marketing list only to another static marketing list.

1. In the Navigation Pane, click **Marketing** or **Sales**, and then click **Marketing Lists**.
2. Open the marketing list from which you want to add members to another list.
3. Under **Related**, click **Marketing List Members**.
4. In the list of members, select the member that you want to add to another list.
5. Under **List Tools**, on the **Marketing List Members** tab, in the **Actions** group, click **Add to Another Marketing List**.
6. In the **Look Up Records** dialog box, in the **Look for** box, type the information you are looking for, and then click the **Find** button .
7. Select the list that you want to add the member to, and then click **OK**.
8. When the confirmation message appears, click **OK**.
9. On the **Marketing List** tab, in the **Save** group, click **Save** or **Save and Close**.

Related Topics

Work with Marketing Lists 389
Creating and Managing Marketing Lists 387
Working Offline 486

Merge marketing lists

Can I do this task?

This task requires permissions that are found in all default marketing security roles. More information about specific permissions and performing this task while offline: Marketing Permissions

Important

When you copy marketing list members, the marketing lists must both contain the same record type, such as all accounts or all contacts.

1. In the Navigation Pane, click **Marketing** or **Sales**, and then click **Marketing Lists**.
2. In the list, select the marketing list that contains the accounts, contacts, or leads that you want to merge into another static marketing list.
3. In the **Actions** group, click **Copy Marketing List**.
4. In the **Look Up Records** dialog box, select the static marketing list that you want to merge members into, and then click **OK**.
5. When the confirmation message appears, click **OK**.

Related Topics

Work with Marketing Lists 389
Creating and Managing Marketing Lists 387

Add members to a marketing list

Can I do this task?

This task requires permissions that are found in all default marketing security roles. More information about specific permissions and performing this task while offline: Marketing Permissions

If you want to change the query for a dynamic marketing list, but want to keep the current list of members intact, you can copy a dynamic marketing list as a static list.

When you copy a dynamic marketing list as a static marketing list, Microsoft Dynamics CRM adds the latest members that match the query criteria of the dynamic marketing list to the static marketing list and then locks the static list. You cannot add or change members of a locked marketing list. If you want to add or modify the members, you must unlock the marketing list.

1. In the Navigation Pane, click **Marketing** or **Sales**, and then click **Marketing Lists**.
2. Click the name of the dynamic marketing list that you want to save as a static list.
3. In the **Actions** group, click **Copy To Static**.
4. When the confirmation message appears, click **OK**.

Related Topics

Work with Marketing Lists 389
Find Things 9
Creating and Managing Marketing Lists 387
Working Offline 486

Evaluate and remove members in a marketing list

Can I do this task?

This task requires permissions that are found in all default marketing security roles. More information about specific permissions and performing this task while offline: Marketing Permissions

1. In the Navigation Pane, click **Marketing** or **Sales**, and then click **Marketing Lists**.
2. Open the marketing list from which you want to remove members.
3. Under **Related**, click **Marketing List Members**.
4. Under **List Tools**, on the **Marketing List Members** tab, in the **Actions** group, click **Manage Members**.
5. In the **Manage Members** dialog box, click one of the following options, and then click **OK**:

   Use Advanced Find to remove members

   a. Select options to search for list members that you want to remove from your list, and then click **Find**. More information: *Find Things* (on page 9)

   b. To remove all the records returned to the list, click **Remove all the members returned by the search from the marketing list**, and then click **Remove from Marketing List**.

   c. To remove just the selected records from the list, select the records you want to remove, click **Remove only the selected members from the marketing list**, and then click **Remove from Marketing List**.

   Use Advanced Find to evaluate members

   a. Select options to search for and locate list members that you want to keep on your list, and then click **Find**. More information: *Find Things* (on page 9)

   b. To keep all the records returned to the list, click **Keep all the members returned by search in the marketing list**, and then click **Update Marketing List**.

   c. To keep just the selected records from the list, select the records you want to keep, click **Keep only the selected members in the marketing list**, and then click **Update Marketing List**.
6. Click **Save** or **Save and Close**.

Related Topics

Work with Marketing Lists 389
Find Things 9
Creating and Managing Marketing Lists 387
Working Offline 486

Qualify or convert multiple records at once

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Sales Permissions

If you need to disqualify a group of leads or if you decide a group of leads are all good, you do not have to process them one by one. Instead, put the leads into a marketing list, and then disqualify the whole group or qualify them by converting the whole group into accounts, contacts, or opportunities all in one step.

1. Create a new marketing list.
   d. In the Navigation Pane, click **Marketing** or **Sales**, and then click **Marketing Lists**.
   a. On the Actions toolbar, click **New**.
   b. In the **Name** box, type a name for the list, and in the **Member Type** box, select **Lead**.
   c. Click **Save**.
2. Under **Related**, click **Marketing List Members**.
3. Under **List Tools**, on the **Marketing List Members** tab, in the **Actions** group, click **Manage Members**.
4. In the **Manage Members** dialog box, click **Use Advanced Find to add members**, and then click **OK**.
5. Create a query to find the list of leads to disqualify or convert.
   a. From the **Use Saved View** list, select **My Open Leads**.
   b. Add any additional criteria you need to the query.

   Tip

   If this query is one that you will use again, click **Save As**, and specify a name for the query.
6. To see the records, click **Find**.
7. Select one of the option buttons at the bottom of the window either to add all the leads returned by the search to the list or to add only selected leads to the list, and then click **Add to Marketing List**.
8. In the marketing list, select multiple lead records:
   - Select several records by pressing the CTRL key while you click each record.

- Select a sequence of records by clicking the first record that you want, and then press the SHIFT key while you select the last record that you want.
- Select all records on the page by selecting the **Select/clear all records on this page** check box at the top of the list.

Tip

By default, the Microsoft Dynamics CRM Web application displays 50 records per page. You can increase this up to a maximum of 250 records per page to increase the number of records you can select at one time. To increase the number of records displayed per page:

1. On the File menu, click Options.
2. On the General tab, in the Records Per Page list, select the number of records to display per page.
3. Click OK. This changes the number of items that is displayed for all lists, which may slow response time when you switch record types. Therefore, you might want to set it back to a smaller number when you are done with this bulk action.

9. After you select the leads you want to convert, under **List Tools**, on the **Marketing List Members** tab, click **Qualify**.
10. In the **Convert Lead** dialog box, disqualify the leads, or select the record types to convert the leads to, and then click **OK**. The leads will still appear on your marketing list, but will no longer appear in your **My Open Leads** view.

Related Topics

Work with Leads 299
Managing Leads 289
Work with Marketing Lists 389

Change the columns displayed for marketing list members

Can I do this task?

This task requires permissions that are found in all default marketing security roles. More information about specific permissions and performing this task while offline: Marketing Permissions

Although you cannot change the default view for marketing list members, you can create your own views with the columns you need, and export these views to Microsoft Office Excel if you need them for printing mailing labels or creating call lists.

1. In the Navigation Pane, click **Marketing** or **Sales**, and then click **Marketing Lists**.
2. Open a marketing list.
3. Under **Related**, click **Marketing List Members**.
4. Under **List Tools**, on the **Marketing List Members** tab, in the **Actions** group, click **Manage Members**.

5. In the **Manage Members** dialog box, click **Use Advanced Find to evaluate members**, and then click **OK**.
6. On the Standard toolbar, click **Edit Columns**, and then in the **Common Tasks** area, click **Add Columns**.
7. Select the columns to add, and then click **OK** twice.
8. In the lower right corner of the window, click **Find**.
9. Click **Update Marketing List**.

Tip
If you save the Advanced Find view to use later, to return to it from any marketing list, click **Manage Members**. When you select to add, remove, or evaluate members, you can select the saved view from the **View** list.

Related Topics

Work with Marketing Lists 389
Creating and Managing Marketing Lists 387
Working Offline 486
Export Data to Excel 61
Find Things 9

Managing Leads

In Microsoft Dynamics CRM, you can get lead information in the Sales area. All activities are logged and a running history of every activity with the lead is kept, once it is completed.

You can enter leads individually. In addition, you can use Microsoft Dynamics CRM to import lead lists into the database, perform the common qualifying activities, and convert leads to opportunities, if they qualify.

Each disqualified lead is retained in the database for business-reporting purposes.

You can track information about prospective customers, and then qualify and assign inquiries. Because leads are tracked separately from customers throughout the sales cycle, you can focus on building your customer base.

Understanding How Accounts, Contacts, Leads, and Opportunities Relate

Account and contact records represent established customers. Leads are potential or prospective customers. Opportunities are not a specific customer, such as a lead, contact, or account, and therefore require a customer record to be added to the opportunity.

Work with Leads

Leads represent potential customers who have not yet been qualified by your sales process. As you qualify leads, you can convert them to other types of records.

Create or edit a lead

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Sales Permissions

When you create a lead, you might be tempted to only enter the system-required fields (marked with asterisks **Business-required** symbol *) or business-recommended fields (marked with plus signs **Business-recommended** symbol +); however, the more data you collect and enter into this form, the more likely you are to turn those leads into business opportunities. Remember that e-mail addresses, the source of the lead, and specific product interests are key factors in helping your sales staff complete the necessary follow-up.

1. In the Navigation Pane, click **Sales**, and then click **Leads**.
2. In the **Records** group, click **New**, or open the record that you want to edit.
3. In the **General** section, enter or edit information or observe any noted restrictions or requirements as needed:
   - **Topic**

     This information should reflect what the lead is interested in. For example, if a potential customer calls and asks for details on a product, list the name of the product here.
   - **First Name**

     Enter a first name between 1 and 50 characters. You can use accent marks when you enter data, for example, in a customer's name. Your ability to sort and find information is not affected by these accent marks.
   - **Last Name**

     Enter a name between 1 and 50 characters.
   - **Company Name**

     You must enter a name with a length of 100 characters or fewer.
   - Enter all the contact information you have available for this lead because this information will assist a salesperson in making future contacts. E-mail addresses must be valid. For example, someone@example.com.
   - **Address**
   - Enter the address of the lead.
     - **ZIP/Postal Code**

Enter a code of 20 characters or fewer.

4. In the **Common** section, enter all the information you have available in the following sections:

   - **Lead Information**

     It is very important to provide the lead source information so that you can determine which marketing method, such as advertisement or trade shows, generates the most leads for your organization. If you specify lead information, you can filter on **Lead Source** to determine how many leads were generated by a given method.

   - **Company Information**

     - **Industry**

       If the lead specifies an industry that is not in the list, you can work with your system administrator to get new industries added to the list because this field is customizable. This field is used in various reports such as Lead Source Effectiveness; which, if used with filtering, can display the lead source effectiveness by industry. Another form that includes the industry field is the Account form. If your system administrator adds custom industries to the Leads form, they should also add them to the Account form to keep the two lists in sync.

   - **Annual Revenue**

     You must enter numbers between 0.00 and 1,000,000,000.00.

     You can use commas and a decimal point. You cannot use a currency symbol, such as the dollar ($), euro (€), or yen (¥).

     - **SIC Code**

       Indicate the Standard Industrial Classification (SIC) code for this account. You can search on SIC for organizations with a particular code to display all accounts of businesses in that category.Enter a code of 20 characters or fewer.

     - **No. of Employees**

       You must enter a whole number between 0 and 1,000,000.

5. Under **Information**, click **Notes and Activities**. In the Notes section, click **Add a new note**, and add the information that applies to your record.

6. In the **Preferences** section, enter information or observe any noted restrictions or requirements as needed:

   - **Owner**

     This box is filled automatically with the name of the user who is creating the record. You can click the **Lookup** button to search for other records.

   - **Status Reason**

     This value appears in the list of leads in the Leads area. You can sort by the **Status Reason** column in that area to quickly view new leads or those already contacted.

   - **Contact Methods**

     - **Preferred**

Select the option that best describes the preferred method of contact.

- **E-mail**

  If you select **Allow**, Microsoft Dynamics CRM allows all e-mail, including e-mails related to campaign activities, to be sent to the e-mail address associated with the record. However, if you select **Do Not Allow**, Microsoft Dynamics CRM does not allow any e-mail to be sent to the e-mail address associated with the record.

- **Bulk E-mail**

  If you select **Allow**, Microsoft Dynamics CRM allows any e-mail as part of a bulk e-mail process, including bulk e-mails related to campaign activities, to be sent to the e-mail address associated with the record. However, if you select **Do Not Allow**, Microsoft Dynamics CRM does not allow any bulk e-mail to be sent to the e-mail address associated with the record.

- **Phone**

  The selected option simply provides information to anyone who views the record. This field is not used by Microsoft Dynamics CRM to control initiating or receiving phone calls.

- **Fax**

  The selected option simply provides information to anyone who views the record.

- **Mail**

  The selected option simply provides information to anyone who views the record. This field is not used by Microsoft Dynamics CRM to control initiating or receiving mail.

- **Marketing Information**

  - **Source Campaign**

    Search for and enter the campaign record if this lead was generated as a result of a campaign that has been created in Microsoft Dynamics CRM.

  - **Send Marketing Materials**

    If you select **Send**, marketing material corresponding to campaigns is sent to the respective addresses (e-mail, physical address) for the record. This includes general marketing mailers that might be sent on a regular basis that are not part of a targeted marketing campaign. If you select **Do Not Send**, marketing materials are not sent, nor can activities related to sending marketing materials be created for the record.

  - **Last Date Included in Campaign**

    Microsoft Dynamics CRM automatically sets the date for this field when any marketing communication is sent to the addresses for the record. You can also manually update this field and enter a date. This field is used as filter criteria in Marketing Automation. For example, the **Anti-Spam Setting** area of a Campaign form uses the date in this field to make sure that you do not send frequent mailers to a customer.

7. Click **Save** or **Save and Close**.

Resolve potential duplicate records.

If the system detects that your record might be a potential duplicate, instead of saving the record, Microsoft Dynamics CRM displays the **Duplicates Detected** dialog box.

1. To open a record to make sure it is a potential duplicate, in the **Potential duplicate records** list, double-click the record.
   - If the duplicate-detection rule identified potential duplicate records in other record types, review records from each record type listed.
2. If your new or updated record is not a duplicate, to create the new record, click **Save Record**.

   - OR -

   If your new or updated record is a duplicate, to cancel your changes, click **Cancel**.

Notes

- If you enter a duplicate record within a few minutes of entering the first record, Microsoft Dynamics CRM will not detect the duplicate record. The matchcodes for new and updated records are created every five minutes, rather than as a record is created.
- Duplicate detection can take place only if duplicate detection is enabled in **Duplicate Detection Settings** and if at least one duplicate-detection rule exists for the record type. More information: *Avoiding Duplicate Records* (on page 69)

  Tip

  To qualify or disqualify a lead, you convert the lead. First, open the lead that you want to convert, click **Convert Lead**, select options for how you want to convert the lead, and then click **OK**.

Related Topics

Work with Leads 299
Managing Leads 289
Work with Marketing Lists 389
Requesting User Interface Changes 220

Qualify and convert a lead to an account, contact, and/or opportunity

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Sales Permissions

Turning leads into customers, or at least opportunities, is the goal of any organization. After you qualify a lead based on the metrics used by your organization, use Microsoft Dynamics CRM to create up to three new records quickly in which the lead is represented as an account, contact, or opportunity.

Only one lead at a time can be converted, unless you add the leads you want to convert to a marketing list.
More information: *Work with Marketing Lists* (on page 389)

1. In the Navigation Pane, click **Sales**, and then click **Leads**.
2. In the list of leads, open the lead you want to qualify and convert.
3. On the **Lead** tab, in the **Actions** group, click **Qualify**.
4. In the **Convert Lead** dialog box, **Qualify and convert into the following records** is selected by default. Select one or more of the following:
   - **Account**

     Select this check box to create an account record. Do this if there is an actual company with which you are doing business.
   - **Contact**

     Select this check box to create a contact record. Do this if you are doing business with an specific individual at a company or just an individual customer (consumer).
   - **Opportunity**

     Select this check box to create an opportunity record. If this is the only option you select, then in the **Potential Customer** box, you must associate an account or contact with the lead. Click the **Lookup** button to search for an account or contact.
   - **Currency**

     If you select **Opportunity**, you must select the currency in which to calculate the opportunity.
   - **Open newly created records**

     Select this check box to open each record in a new window.
5. Click **OK**.
6. If you did not select the **Open newly created records** check box, then you must click the **Close** button to close the lead record.

Tip

To view the lead record after it has been converted to an opportunity, open the opportunity, and then click **Originating Lead** on the **Administration** tab.

Notes

- Based on the security privileges assigned to your user account, you might not be able to qualify leads that you do not own. If you have to qualify them, you must have the necessary privileges. Also, regardless of who qualifies the lead and performs the conversion, all the newly created records are, by default, owned by the user who owned the original lead.
- Any notes on a lead record do not transfer to the new account, contact, or opportunity record. The notes remain with the originating lead record.
- When you convert a lead, the new record that is created will not be checked to see if it is a duplicate.

Related Topics

Work with Leads 299
Convert Lead Dialog Box 310
Managing Leads 289
Work with Marketing Lists 389

Disqualify and close a lead

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Sales Permissions

When you decide that a lead will not turn into an opportunity or become a customer, you can disqualify it and still have an audit trail for your sales process. You can reactivate the record, including any attachments and notes, without having to re-enter all the data if the lead contacts you in the future. Deleting the record also removes any attachments and notes.

1. In the Navigation Pane, click **Sales**, and then click **Leads**.
2. In the list of leads, open the lead that you want to disqualify.
3. In the **Actions** group, click **Qualify**.
4. In the **Convert Lead** dialog box, select **Disqualify**, and then in the **Status** list, click an option.
5. Click **OK**, and then close the record.

Note
Disqualified leads appear in the **Closed Leads** view.

Related Topics

Work with Leads 299
Convert Lead Dialog Box 310
Managing Leads 289

Reactivate a closed lead

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Sales Permissions

You disqualify a lead by closing the lead record. Closed leads can be reactivated. Deleted leads are permanently removed and cannot be reactivated. When you reactivate a lead, you save time by not having to re-enter any data and you maintain the original history of the lead.

1. In the Navigation Pane, click **Sales**, and then click **Leads**.
2. In the **View** list, click **Closed Leads**.
3. In the list of closed leads, open the lead you want to reactivate.
4. In the **Actions** group, click **Reactivate Lead**.
5. In the **Confirm Lead Activation** dialog box, click **OK**.
6. Click **Save** or **Save and Close**.

Related Topics

Work with Leads....299
Managing Leads....289

Add or remove a customer record in a marketing list

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Sales Permissions

You can add a customer record, such as a lead, account, or contact, to a marketing list. If a customer record is added to a marketing list from another area within Microsoft Dynamics CRM, the customer record is updated to reflect this association. Therefore, if you want to add a customer record, such as a lead, to a marketing list, you might find that the lead is already associated with the list.

1. In the Navigation Pane, click **Sales**, and then click **Leads**, **Accounts**, or **Contacts** depending on which type of record you want to add to a marketing list.
2. In the list, open the record that you want to add to a marketing list.
3. In the **Collaborate** group, click **Add to Marketing List**.
4. In the **Look Up Record** dialog box, locate and select the marketing list you want to add the record to, and then click **OK**.
5. Click **Save** or **Save and Close**.

Note

To remove a record from a marketing list, open the customer record you want to remove from the marketing list. In the Navigation Pane, under **Marketing**, click **Marketing Lists**. Select the marketing list that you want to remove, and then, in the **Records** group, click **Remove**. In the confirmation message, click **OK**.

Tip

If you cannot locate the marketing list you want to add, you might need to create it. To do this, in the **Look Up Records** dialog box, click **New** and then complete the form.

Related Topics

Work with Contacts 276
Work with Accounts 271
Managing Accounts and Contacts 265
Work with Leads 299
Managing Leads 289
Work with Marketing Lists 389

View associated campaigns from customer records

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Sales Permissions

You can view a list of campaigns for a customer from within the Customer Record form. When a customer record is added to a marketing list and that marketing list is added to a campaign, the customer record is updated to reflect this association.

1. In the Navigation Pane, click **Sales**, and then click **Leads**, **Accounts**, or **Contacts**, depending on which type of record you want to view associated campaigns for.
2. In the list, open the record that you want to view.
3. Under **Marketing**, click **Campaigns** to see the list of campaigns the customer is included in.

Related Topics

Work with Contacts 276
Work with Leads 299
Managing Leads 289
Work with Accounts 271
Managing Accounts and Contacts 265
Work with Campaigns and Campaign Templates 375

Create Quick Campaign

A privilege required to create a new quick campaign. This privilege is on the **Marketing** tab in **Security Roles**.

Use the Closed Activity list

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Sales Permissions

Many record types allow for activities to be associated with them. For example, an opportunity might have an associated phone call activity. When you close any associated activity as completed, that activity shows up in the record history of the associated record. To view the record history, in the record, under **Common**, click **Closed Activities**.

You can do the following in the **Closed Activities** list:

- While the record is in draft form, you can create a new activity for this record by clicking the **New Activity** button. You can no longer do this when the record is activated. Note that even though you create this activity from the **Closed Activities** list, it will be displayed in the **Activities** list while it is active. It will be displayed in the **Closed Activities** list after you set the status to completed.
- You can also do standard tasks such as printing, exporting data, running a report, or assigning. For information about doing those tasks, see the topic What else can I do? More tasks...

The **Closed Activities** list for opportunities, accounts, and contacts includes two lists that help you narrow down the number of completed activities:

- To narrow down the list to a certain time period, such as Last 30 days, click **Filter on**.
- To see completed activities for one particular record, click **Include**, and then select **This Record Only**.
- To create a list of activities that are related to any record associated with the account or contact, select **Related Regarding Records**.

Related Topics

Manage Activities 23

Default sales reports

The following sales reports are available:

This topic shows you how to use the different reports. To find more information, when you generate a report, click **Help**, and then click **Help on This Page**.

- *Account Distribution Report* (on page **Error! Bookmark not defined.**)

  Use this report to identify patterns in your top revenue-generating accounts using two charts. The earned revenue chart displays the earned revenue grouped by a market facet, such as product, territory, or industry. The accounts count chart displays the amount of earned revenue using the same grouping as the earned revenue chart.

- *Account Overview Report* (on page 99)

  Use this report to obtain a one-page overview of everything occurring with an account. The report displays a profile of the account, contact information, and summaries of opportunities and case activities.

- *Account Summary Report* (on page 100)

  Use this report to determine historically what has occurred with an account. This report also displays what is scheduled to occur in the future. The report displays a chronological summary for an account, including sales and service activities, notes, and records.

- *Activities Report* (on page 101)

  Use this report to identify patterns in activities. Activities can be grouped by owner or activity type, or by the record the activity is regarding.

- *Competitor Win Loss Report* (on page 101)

  Use this report to compare how your sales team performs against your competitors. The report displays a list of competitors, with data on open, closed, won, and lost opportunities for each.

- *Invoices Report* (on page 102)

  Use this report to print invoices.

- Invoice Status Report

  Use this report to view your accounts receivable. The chart displays the number of invoices grouped by status with the total amount of invoices in each status.

- *Lead Source Effectiveness Report* (on page 103)

  Use this report to compare how effective your lead sources are at generating quality opportunities. The report lists the percentage of qualified leads, and leads that generate revenue for each lead category.

- *Neglected Accounts Report* (on page 107)

  Use this report to identify accounts that have not been contacted recently. The report displays a chart with accounts that have had no activities completed in a specified number of days.

- *Neglected Leads Report* (on page 104)

  Use this report to identify any leads that have not been contacted. The report displays a chart of leads that have had no associated activities or notes during a specified time period.

- *Orders Report* (on page 104)

  Use this report to print orders.

- *Products by Account Report* (on page 108)

  Use this report to see which products are used by an account. For each account, the report lists the associated products.

- *Products by Contact Report* (on page 109)

  Use this report to see which products are used by a contact. For each contact, the report lists the associated products.

- Progress Against Goals Report

- Use this report to view the sales progress against the primary and subordinate goals. This report displays a chart with the target values and the actual values of the goals.
- *Quotes Report* (on page 105)

  Use this report to print quotes.
- *Sales History Report* (on page 106)

  Use this report to view a history of sales performance by sales representative. The report displays a chart of both lost and earned revenue. The report uses data only from the closed opportunities, and calculates the earned revenue from Won opportunities and the lost revenue from the lost opportunities.
- *Sales Pipeline Report* (on page 106)

  Use this report to see anticipated potential sales. The report displays a chart of potential sales grouped by user, sales territory, customer territory, date, products, rating, or sales stage.

If the default reports don't provide the information you need, try creating an Advanced Find search, and exporting the results to Microsoft Office Excel.

Note
This topic documents the list of default reports as they were shipped. If this list differs from the reports that are available to you, contact your report administrator or system administrator for information about the customized reports.

Related Topics

Work with Opportunities 310
Work with Leads 299
Work with Contacts 276
Work with Accounts 271

Convert Lead Dialog Box

Use this dialog box to qualify or disqualify a lead as a potential customer.

To qualify leads, you convert them into opportunities with associated accounts or contacts or into new accounts or contacts. To disqualify leads, click the **Disqualify** option which closes the leads without converting them.

Managing Accounts and Contacts

In Microsoft Dynamics CRM, you can manage, share, and collaborate on accounts and contacts within your organization.

You can enter accounts or contacts individually or you can use Microsoft Dynamics CRM to import lists of these records into the database.

Work with Accounts

Accounts represent companies that your organization may do business with.

Concepts: *Managing Accounts and Contacts* (on page 265)

Create or edit an account

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Sales Permissions

1. In the Navigation Pane, click **Sales**, and then click **Accounts**.
2. In the **Records** group, click **New** or open the record that you want to edit.
3. In the **General** section, enter or edit information or observe any noted restrictions or requirements as needed:
   - **Account Name**

     You can use accent marks when you enter data, for example, in a customer's name. Your ability to sort and find information is not affected by these accent marks.
   - **Primary Contact**

     To locate and select a primary contact, click the **Lookup** button .
   - **Account Number**

     You must enter 20 characters or less.
   - **Parent Account**

     If the account that you are creating is a sub-account, then you must set up a relationship to its parent account. To locate and select a parent account, click the **Lookup** button .

     If the account that you are creating is a parent account, leave this field blank.
   - **E-mail**

     E-mail addresses must be valid. For example, someone@example.com. Although this field is optional, including an e-mail address allows you to communicate with the account by using e-mail.
   - **ZIP/Postal Code**

     Enter a code of 20 characters or fewer. Although this field is optional, including a ZIP Code or postal code can provide basic geographical information about the account that you can use in other areas of the application, such as reports and workflows.

4. In the **Details** section, observe any noted restrictions or requirements and enter all the information you have available in the following fields:

   - **Industry**

     Select an option from the list. This field can be customized, so the values will vary.

     If the account specifies an industry that is not in the list, you can ask your system administrator to add new industries to the list. This field is used in various reports such as **Account Overview**.

     The lead form also includes the industry field. If your system administrator adds custom industries to the account form, he or she should also add them to the lead form to keep the two lists synchronized.

   - **Annual Revenue**

     You must enter numbers between 0.00 and 1,000,000,000.00.

     You can use commas and a decimal point. You cannot use a currency symbol, such as the dollar ($), euro (€), or yen (¥).

   - **No. of Employees**

     You must enter a whole number between 0 and 1,000,000.

   - **SIC Code**

     Indicate the Standard Industrial Classification (SIC) code for this account. You can search on SIC for organizations with a particular code to display all accounts of businesses in that category. Enter a code of 20 characters or fewer.

   - **Ownership**

     Select an option that indicates how shares of the company are held. For example, if the company is held publicly, meaning its stock is traded on the open market, then its ownership is public.

   - **Ticker Symbol**

     If you enter a ticker symbol for a market outside the United States, you must prefix it with the country code, for example US:MSFT (*country code:ticker symbol*). This information is available only for markets that are currently listed on the MSN Money Web site. In addition to the United States (US), MSN Money also provides information for markets in Australia (AU), Belgium (BE), Canada (CA), France (FR), Germany (DE), Italy (IT), Japan (JP), Netherlands (NL), Spain (ES), Sweden (SE), and the United Kingdom (UK). For more information, go to the *MSN Money Web site* (see MSN Money Web site - *http://go.microsoft.com/fwlink/?LinkId=95957*).

   - **Territory**

     To locate and select a record, click the **Lookup** button .

     The Territory field can be customized, so the values will vary. If there are no territories in the list or the territory that you want is not listed, contact your system administrator and ask him or her to add the territory to the **Sales Territories** area, which is located in the **Settings** area.

   - **Category**

     Select an option from the list. This field can be customized, so the values will vary.

The default values are **Preferred Customer** and **Standard**. Your organization might add other values to manage territories.

These values help determine how to set up territories so that your organization has roughly an equal number of highly rated accounts. The values might also reflect the priority of the account.

- **Relationship Type**

  Select an option from the list. This field can be customized, so the values will vary.

  Your organization might set up relationship roles, to indicate the role of your customers as they relate to your business. This field is not required.

  If there are no relationship roles in the list or the relationship role you want is not listed, contact your system administrator and ask them to add the relationship role to the **Relationship Roles** area, which is located in the **Settings** area.

- **Credit Limit**

  This field is not used as part of the business logic in Microsoft Dynamics CRM; however, your organization might use it as part of a workflow process.

- **Credit Hold**

  This field is not used as part of the business logic in Microsoft Dynamics CRM; however, your organization might use it as part of a workflow process.

- **Payment Terms**

  This field is mapped to any orders that are created for the record.

- **Price List**

  If your organization has price lists set up, you can click the **Lookup** button to search for and select the appropriate price list.

  This field is mapped to any orders that are created for the record.

5. Under **Information**, click **Notes and Activities**. In the Notes section, click **Add a new note**, and add the information that applies to your record.
6. In the **Preferences** section, enter information or observe any noted restrictions or requirements as needed:

   - **Owner**

     This box is filled automatically with the name of the user who is creating the record. You can click the **Lookup** button to search for other records.

   - **Contact Methods**

     - **Preferred**

       Select the option that best describes the preferred method of contact.

     - **E-mail**

       If you select **Allow**, Microsoft Dynamics CRM allows all e-mail, including e-mails related to campaign activities, to be sent to the e-mail address associated with the record. However, if you

select **Do Not Allow**, Microsoft Dynamics CRM does not allow any e-mail to be sent to the e-mail address associated with the record.

- **Bulk E-mail**

  If you select **Allow**, Microsoft Dynamics CRM allows any e-mail as part of a bulk e-mail process, including bulk e-mails related to campaign activities, to be sent to the e-mail address associated with the record. However, if you select **Do Not Allow**, Microsoft Dynamics CRM does not allow any bulk e-mail to be sent to the e-mail address associated with the record.

- **Phone**

  The selected option simply provides information to anyone who views the record. This field is not used by Microsoft Dynamics CRM to control initiating or receiving phone calls.

- **Fax**

  The selected option simply provides information to anyone who views the record.

- **Mail**

  The selected option simply provides information to anyone who views the record. This field is not used by Microsoft Dynamics CRM to control initiating or receiving mail.

- **Marketing Information**

  - **Originating Lead**

    If this account was the result of converting a lead, then this field will automatically show the lead record. You can also enter the originating lead.

    To locate and select a lead, click the **Lookup** button .

  - **Send Marketing Materials**

    If you select **Send**, marketing material corresponding to campaigns is sent to the respective addresses (e-mail, physical address) for the record. This includes general marketing mailers that might be sent on a regular basis that are not part of a targeted marketing campaign. If you select **Do Not Send**, marketing materials are not sent, nor can activities related to sending marketing materials be created for the record.

  - **Last Date Included in Campaign**

    Microsoft Dynamics CRM automatically sets the date for this field when any marketing communication is sent to the addresses for the record. You can also manually update this field and enter a date. This field is used as filter criteria in Marketing Automation. For example, the **Anti-Spam Setting** area of a Campaign form uses the date in this field to make sure that you do not send frequent mailers to a customer.

- **Service Preferences**

  Select the customer's preferred time and day for service activities.

  Click the **Lookup** button in the **Preferred Service**, **Preferred Facility/Equipment**, or **Preferred User** box to search for the appropriate record.

  Click the **Preferred Service**, **Preferred Facility/Equipment**, or **Preferred User** box to search for the appropriate record.

7. Click **Save** or **Save and Close**.

   Resolve potential duplicate records.

If the system detects that your record might be a potential duplicate, instead of saving the record, Microsoft Dynamics CRM displays the **Duplicates Detected** dialog box.

1. To open a record to make sure it is a potential duplicate, in the **Potential duplicate records** list, double-click the record.

   - If the duplicate-detection rule identified potential duplicate records in other record types, review records from each record type listed.

2. If your new or updated record is not a duplicate, to create the new record, click **Save Record**.

   - OR -

   If your new or updated record is a duplicate, to cancel your changes, click **Cancel**.

Notes

- If you enter a duplicate record within a few minutes of entering the first record, Microsoft Dynamics CRM will not detect the duplicate record. The matchcodes for new and updated records are created every five minutes, rather than as a record is created.
- Duplicate detection can take place only if duplicate detection is enabled in **Duplicate Detection Settings** and if at least one duplicate-detection rule exists for the record type. More information: *Avoiding Duplicate Records* (on page 69)

Tips

- You can add more addresses to handle various locations for a given account or contact. To do this, under **Common**, click **More Addresses**, and then in the **Records** group, click **Add New Address**.
- When the **Look Up Records** dialog box is open, if the record you need doesn't exist, click **New**, and create the record.
- If you create both accounts and subaccounts, and create relationships between them, then you can use the reporting features to get subtotals or total revenue reports for all the related accounts.

Related Topics

Work with Accounts 271
Manage Activities 23
Managing Accounts and Contacts 265
Requesting User Interface Changes 220

Work with Contacts

Contacts are people who represent customers or potential customers, or someone related to an account. You can bulk add Microsoft Office Outlook contacts into Microsoft Dynamics CRM with the Add Contacts Wizard. More information: *Resource Center* (see Resource Center - http://go.microsoft.com/fwlink/?LinkId=208670).

Create or edit a contact

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Sales Permissions

1. In the Navigation Pane, click **Sales**, and then click **Contacts**.
2. In the **Records** group, click **New**, or open the record that you want to edit.
3. In the **General** section, enter or edit information or observe any noted restrictions or requirements as needed:
   - **First Name**

     Enter a first name between 1 and 50 characters.You can use accent marks when you enter data, for example, in a customer's name. Your ability to sort and find information is not affected by these accent marks.
   - **Last Name**

     Enter a name between 1 and 50 characters.
   - **Parent Customer**

     If the contact record that you are creating is a subcontact, you can specify its parent contact or customer record. To locate and select a parent customer, click the **Lookup** button .

     If the contact that you are creating is a parent customer, leave this field blank.
   - **E-mail**

     E-mail addresses must be valid. For example, someone@example.com.
   - **ZIP/Postal Code**

     Enter a code of 20 characters or fewer.
4. In the **Details** section, observe any noted restrictions or requirements and enter all the information you have available in the following fields:
   - **Birthday**

     You must enter the date in the format your organization has set for dates. For example, 01/01/2006 or 31.12.2005.

     If you omit leading zeros in a date, Microsoft Dynamics CRM will add them automatically. For example, when you type 1/1/06, Microsoft Dynamics CRM will display it as 01/01/2006, if that is the date format of your organization.

- **Anniversary**

  You must enter the date in the format your organization has set for dates. For example, 01/01/2006 or 31.12.2005.

  If you omit leading zeros in a date, Microsoft Dynamics CRM will add them automatically. For example, when you type 1/1/06, Microsoft Dynamics CRM will display it as 01/01/2006, if that is the date format of your organization.

5. Under **Information**, click **Notes and Activities**. In the Notes section, click **Add a new note**, and add the information that applies to your record.
6. In the **Preferences** section, enter information or observe any noted restrictions or requirements as needed:

   - **Owner**

     This box is filled automatically with the name of the user who is creating the record. You can click the **Lookup** button to search for other records.

   - **Credit Limit**

     This field is not used as part of the business logic in Microsoft Dynamics CRM; however, your organization might use it as part of a workflow process.

   - **Credit Hold**

     This field is not used as part of the business logic in Microsoft Dynamics CRM; however, your organization might use it as part of a workflow process.

   - **Payment Terms**

     This field is mapped to any orders that are created for the record.

   - **Price List**

     If your organization has price lists set up, you can click the **Lookup** button to search for and select the appropriate price list. This field is mapped to any orders that are created for the record.

   - **Contact Methods**

     - **Preferred**

       Select the option that best describes the preferred method of contact.

     - **E-mail**

       If you select **Allow**, Microsoft Dynamics CRM allows all e-mail, including e-mails related to campaign activities, to be sent to the e-mail address associated with the record. However, if you select **Do Not Allow**, Microsoft Dynamics CRM does not allow any e-mail to be sent to the e-mail address associated with the record.

     - **Bulk E-mail**

       If you select **Allow**, Microsoft Dynamics CRM allows any e-mail as part of a bulk e-mail process, including bulk e-mails related to campaign activities, to be sent to the e-mail address associated with the record. However, if you select **Do Not Allow**, Microsoft Dynamics CRM does not allow any bulk e-mail to be sent to the e-mail address associated with the record.

- **Phone**

  The selected option simply provides information to anyone who views the record. This field is not used by Microsoft Dynamics CRM to control initiating or receiving phone calls.

- **Fax**

  The selected option simply provides information to anyone who views the record.

- **Mail**

  The selected option simply provides information to anyone who views the record. This field is not used by Microsoft Dynamics CRM to control initiating or receiving mail.

- **Marketing Information**

  - **Originating Lead**

    If this contact was the result of converting a lead, then this field will automatically show the lead record. You can also enter the originating lead. To locate and select a lead, click the **Lookup** button .

  - **Send Marketing Materials**

    If you select **Send**, marketing material corresponding to campaigns is sent to the respective addresses (e-mail, physical address) for the record. This includes general marketing mailers that might be sent on a regular basis that are not part of a targeted marketing campaign. If you select **Do Not Send**, marketing materials are not sent, nor can activities related to sending marketing materials be created for the record.

  - **Last Date Included in Campaign**

    Microsoft Dynamics CRM automatically sets the date for this field when any marketing communication is sent to the addresses for the record. You can also manually update this field and enter a date. This field is used as filter criteria in Marketing Automation. For example, the **Anti-Spam Setting** area of a Campaign form uses the date in this field to make sure that you do not send frequent mailers to a customer.

- **Service Preferences**

  Select the customer's preferred time and day for service activities.

  Click the **Lookup** button in the **Preferred Service**, **Preferred Facility/Equipment**, or **Preferred User** box to search for the appropriate record.

7. Click **Save** or **Save and Close**.

Resolve potential duplicate records.

If the system detects that your record might be a potential duplicate, instead of saving the record, Microsoft Dynamics CRM displays the **Duplicates Detected** dialog box.

1. To open a record to make sure it is a potential duplicate, in the **Potential duplicate records** list, double-click the record.

   - If the duplicate-detection rule identified potential duplicate records in other record types, review records from each record type listed.

2. If your new or updated record is not a duplicate, to create the new record, click **Save Record**.

   - OR -

   If your new or updated record is a duplicate, to cancel your changes, click **Cancel**.

Notes

- If you enter a duplicate record within a few minutes of entering the first record, Microsoft Dynamics CRM will not detect the duplicate record. The matchcodes for new and updated records are created every five minutes, rather than as a record is created.
- Duplicate detection can take place only if duplicate detection is enabled in **Duplicate Detection Settings** and if at least one duplicate-detection rule exists for the record type. More information: *Avoiding Duplicate Records* (on page 69)

  Note
  You can associate multiple contacts with an account, but only one contact can be the primary contact for an account. If you consolidate contacts and subcontacts, you can create relationships between them and use the reporting features to generate revenue reports for all the related contacts.

  -

Related Topics

Work with Contacts 276
Manage Activities 23
Create Customer-Ready Documents and Messages 164
Requesting User Interface Changes 220

Associate an opportunity with an account or contact

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Sales Permissions

You associate opportunities with accounts or contacts by creating an opportunity relationship between them. The relationship you set up is based on your selection on the **Opportunity Relationship** form.

1. In the Navigation Pane, click **Sales**, and then click either **Accounts** or **Contacts**.
2. In the list of accounts or contacts, open the record to which you want to add an opportunity relationship.
3. Click the **Add** tab. In the **Create Relationship** group, click **Relationship**, and then click **Opportunity**.
4. On the **Opportunity Relationship** form, enter information in the following boxes:

   - **Opportunity**

     You must select the opportunity that you want to associate with the record. Click the **Lookup** button to search for an opportunity.

- **Customer**

  Microsoft Dynamics CRM enters the account or contact record automatically.

- **Customer Role**

  Select an option from the list. This field can be customized, so the values will vary.

  Your organization might set up relationship roles, to indicate the role of your customers as they relate to your business. This field is not required.

  If there are no relationship roles in the list or the relationship role you want is not listed, contact your system administrator and ask them to add the relationship role to the **Relationship Roles** area, which is located in the **Settings** area.

- **Description**

  Use this field to provide additional information about the relationship.

5. Click **Save** or **Save and Close**.
6. Click the **Account** or **Contact** tab. Click **Save** or **Save and Close**.

Note
You cannot set up duplicate relationships between a customer record and an opportunity. For example, if you create a relationship between an account and the opportunity, and the customer's relationship role is set to Distributor, you cannot create a new relationship for the account that uses the same customer opportunity and relationship role.

Related Topics

Work with Contacts 276
Work with Accounts 271
Work with Opportunities 310
Managing Opportunities 310
Requesting User Interface Changes 220

Use the Closed Activity list

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Sales Permissions

Many record types allow for activities to be associated with them. For example, an opportunity might have an associated phone call activity. When you close any associated activity as completed, that activity shows up in the record history of the associated record. To view the record history, in the record, under **Common**, click **Closed Activities**.

You can do the following in the **Closed Activities** list:

- While the record is in draft form, you can create a new activity for this record by clicking the **New Activity** button. You can no longer do this when the record is activated. Note that even though you create this activity from the **Closed Activities** list, it will be displayed in the **Activities** list while it is active. It will be displayed in the **Closed Activities** list after you set the status to completed.
- You can also do standard tasks such as printing, exporting data, running a report, or assigning. For information about doing those tasks, see the topic What else can I do? More tasks...

The **Closed Activities** list for opportunities, accounts, and contacts includes two lists that help you narrow down the number of completed activities:

- To narrow down the list to a certain time period, such as Last 30 days, click **Filter on**.
- To see completed activities for one particular record, click **Include**, and then select **This Record Only**.
- To create a list of activities that are related to any record associated with the account or contact, select **Related Regarding Records**.

Related Topics

Manage Activities 23

Set customer preferences for a service activity

Can I do this task?

This task requires permissions that are found in all default service scheduling security roles.More information about specific permissions and performing this task while offline: Service Scheduling Permissions

You can provide personalized customer service for your customers by recording their preferences regarding services and service times. These preferences become the default criteria the next time that a service activity is scheduled for the customer and shown in the **Form Assistant** pane.

1. In the Navigation Pane, click **Workplace**, and then under **Customers**, click either **Accounts** or **Contacts**.
2. In the list, double-click a record.
3. Under **Information**, click **Common**.
4. Under **Service Preferences**, click the customer's preferred time and day for appointments from the lists.
5. Click the **Preferred Service**, **Preferred Facility/Equipment**, or **Preferred User** box to search for the this information. You can click the **Lookup** button to search for and select records.
6. Click **Save** or **Save and Close**.

Related Topics

Work with Contacts 276
Work with Accounts 271
Navigating the Service Calendar 427

Add or remove a customer record in a marketing list

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Sales Permissions

You can add a customer record, such as a lead, account, or contact, to a marketing list. If a customer record is added to a marketing list from another area within Microsoft Dynamics CRM, the customer record is updated to reflect this association. Therefore, if you want to add a customer record, such as a lead, to a marketing list, you might find that the lead is already associated with the list.

1. In the Navigation Pane, click **Sales**, and then click **Leads**, **Accounts**, or **Contacts** depending on which type of record you want to add to a marketing list.
2. In the list, open the record that you want to add to a marketing list.
3. In the **Collaborate** group, click **Add to Marketing List**.
4. In the **Look Up Record** dialog box, locate and select the marketing list you want to add the record to, and then click **OK**.
5. Click **Save** or **Save and Close**.

Note

To remove a record from a marketing list, open the customer record you want to remove from the marketing list. In the Navigation Pane, under **Marketing**, click **Marketing Lists**. Select the marketing list that you want to remove, and then, in the **Records** group, click **Remove**. In the confirmation message, click **OK**.

Tip

If you cannot locate the marketing list you want to add, you might need to create it. To do this, in the **Look Up Records** dialog box, click **New** and then complete the form.

Related Topics

Work with Contacts 276
Work with Accounts 271
Managing Accounts and Contacts 265
Work with Leads 299
Managing Leads 289
Work with Marketing Lists 389

View associated campaigns from customer records

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Sales Permissions

You can view a list of campaigns for a customer from within the Customer Record form. When a customer record is added to a marketing list and that marketing list is added to a campaign, the customer record is updated to reflect this association.

1. In the Navigation Pane, click **Sales**, and then click **Leads**, **Accounts**, or **Contacts**, depending on which type of record you want to view associated campaigns for.
2. In the list, open the record that you want to view.
3. Under **Marketing**, click **Campaigns** to see the list of campaigns the customer is included in.

Related Topics

Work with Contacts 276
Work with Leads 299
Managing Leads 289
Work with Accounts 271
Managing Accounts and Contacts 265
Work with Campaigns and Campaign Templates 375

Deactivate or activate an account or contact

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Sales Permissions

Instead of deleting an account or contact, you can deactivate it and still have an audit trail for your sales process. When an account or contact is deactivated, it cannot be edited, and relationships between the account or contact and other records cannot be created.

The only way to view a deactivated account or contact is to select **Inactive Accounts** or **Inactive Contacts** in the **View** list. If the representative of the account or the individual contact for the record that you deactivated contacts you in the future, you have the option of reactivating the account or contact without reentering all the data.

1. In the Navigation Pane, click **Sales**, and then click either **Accounts** or **Contacts**.
2. Select the accounts or contacts that you want to deactivate or activate.
3. In the **Records** group, click **Deactivate**.

   - OR -

   - In the **Records** group, click **Activate**.
4. In the confirmation dialog box, click **OK**.

   Note
   When you deactivate a record, all relationships created while it was active continue to be available; however, you cannot create new relationships with a deactivated record.

Related Topics

Work with Contacts 276
Work with Accounts 271
Managing Accounts and Contacts 265

Create Quick Campaign

A privilege required to create a new quick campaign. This privilege is on the **Marketing** tab in **Security Roles**.

The following sales reports are available:

This topic shows you how to use the different reports. To find more information, when you generate a report, click **Help**, and then click **Help on This Page**.

- Account Distribution Report

  Use this report to identify patterns in your top revenue-generating accounts using two charts. The earned revenue chart displays the earned revenue grouped by a market facet, such as product, territory, or industry. The accounts count chart displays the amount of earned revenue using the same grouping as the earned revenue chart.
- Account Overview Report

Use this report to obtain a one-page overview of everything occurring with an account. The report displays a profile of the account, contact information, and summaries of opportunities and case activities.

- Account Summary Report

  Use this report to determine historically what has occurred with an account. This report also displays what is scheduled to occur in the future. The report displays a chronological summary for an account, including sales and service activities, notes, and records.

- Activities Report

  Use this report to identify patterns in activities. Activities can be grouped by owner or activity type, or by the record the activity is regarding.

- Competitor Win Loss Report

  Use this report to compare how your sales team performs against your competitors. The report displays a list of competitors, with data on open, closed, won, and lost opportunities for each.

- Invoices Report

  Use this report to print invoices.

- Invoice Status Report

  Use this report to view your accounts receivable. The chart displays the number of invoices grouped by status with the total amount of invoices in each status.

- Lead Source Effectiveness Report

  Use this report to compare how effective your lead sources are at generating quality opportunities. The report lists the percentage of qualified leads, and leads that generate revenue for each lead category.

- Neglected Accounts Report

  Use this report to identify accounts that have not been contacted recently. The report displays a chart with accounts that have had no activities completed in a specified number of days.

- Neglected Leads Report

  Use this report to identify any leads that have not been contacted. The report displays a chart of leads that have had no associated activities or notes during a specified time period.

- Orders Report

  Use this report to print orders.

- Products by Account Report

  Use this report to see which products are used by an account. For each account, the report lists the associated products.

- Products by Contact Report

  Use this report to see which products are used by a contact. For each contact, the report lists the associated products.

- Progress Against Goals Report
- Use this report to view the sales progress against the primary and subordinate goals. This report displays a chart with the target values and the actual values of the goals.

- Quotes Report

  Use this report to print quotes.

- Sales History Report

  Use this report to view a history of sales performance by sales representative. The report displays a chart of both lost and earned revenue. The report uses data only from the closed opportunities, and calculates the earned revenue from Won opportunities and the lost revenue from the lost opportunities.

- Sales Pipeline Report

  Use this report to see anticipated potential sales. The report displays a chart of potential sales grouped by user, sales territory, customer territory, date, products, rating, or sales stage.

If the default reports don't provide the information you need, try creating an Advanced Find search, and exporting the results to Microsoft Office Excel.

Note
This topic documents the list of default reports as they were shipped. If this list differs from the reports that are available to you, contact your report administrator or system administrator for information about the customized reports.

Related Topics

Work with Opportunities 310
Work with Leads 299
Work with Contacts 276
Work with Accounts 271

Service

Scheduling Services for Your Customers

You can view a list of resources and manage service activities in the Service calendar area.

When you create a new service activity, you can search for an available time based on your criteria, including by times or resources. At any time, you can check for conflicts in the schedule.

If your business uses workflow, you can create workflow rules and processes that include service activities.

More information: *Schedule Service Activity* (on page 428)

Navigating the Service Calendar

You can use the Service calendar that is available in the Service area to schedule service activities and appointments for your organization. In the Service calendar, you can do all of the following tasks and activities:

- View your organization's daily, weekly, and monthly schedule of appointments and service activities.
- View work schedules and service activity schedules for a variety of resources.
- Create new appointments and schedule service activities.
- Change the status of an existing service activity.
- Search for conflicts in the schedule.

You cannot customize the Service calendar or change the default view with the application. However, you can use ISV.Config to change the colors of the time blocks.

More information: *Resource Center* (see Resource Center - http://go.microsoft.com/fwlink/?LinkId=208669)

Read more about:

- Viewing Appointments and Service Activities
- Viewing Details for Resources, Appointments, and Service Activities
- Legend of Colors and Statuses
- Using the Calendar Pane to Change the Date Display

Service Calendar

Use the calendar to create, view, and edit service activities and appointments.

View the Service Calendar

Can I do this task?

This task requires permissions that are found in all default service scheduling security roles.More information about specific permissions and performing this task while offline: Service Scheduling Permissions

The Service calendar displays the appointments and service activities for your organization. The Service calendar is not available in Microsoft Dynamics CRM for Outlook.

1. In the Navigation Pane, click **Service**, and then click **Service Calendar**.
2. On the Service calendar, you can change the view by doing any of the following:
   - **Change the calendar view.**

     Under **Calendar Views**, click one of the views:

     - **Today**

       The daily schedule.
     - **Month**

       The monthly schedule.
     - **Week**

       The schedule for the 7-day week.
     - **Day**

       The daily schedule for an individual, selected day.
   - **View a summary of an appointment or service activity.**

     On the Service calendar, place the cursor over the appointment or service activity.
   - **View or edit the details of an appointment or service activity.**

     On the Service calendar, double-click the appointment. The **Appointment** form opens.
   - **Change the dates displayed on the**Service calendar.

     On the Calendar control, click the arrows or a specific date.
   - **View today's appointments and service activities.**

     On the calendar control, click **Today**. The calendar displays the hourly list for today.
   - **Refresh the calendar.**

     In the upper-right corner of the calendar, click the **Refresh** button .

Related Topics

Service Calendar 427
Navigating the Service Calendar 427

Schedule a service activity

Can I do this task?

This task requires permissions that are found in all default service scheduling security roles.More information about specific permissions and performing this task while offline: Service Scheduling Permissions

Use this procedure to find the next available times for a service. This is the fastest way to schedule a service activity.

1. In the Navigation Pane, click **Service**, and then click **Service Calendar**.
2. In the **Actions** group, click **Schedule**.

   Note
   If you click **New**, and then **Service Activity**, you will create a service activity without checking for available times.
3. On the **Schedule Service Activity** form, you must enter the following information:
   - **Service**

     Locate and select the service you want to schedule. You can click the **Lookup** button to search for and select records.
   - **Duration**

     Do not clear the **Use Default Duration** check box and change the duration unless you want to schedule more time than the default duration of the service. The maximum duration of a service activity is 10 days.
4. Click **Find Available Times**. The next available times are displayed. If there is more than one page of records available to view in the list of records, use the **Page** arrows at the bottom of the list to view the additional pages.
5. Under **Available Times**, click the start or end time of the time that you want to schedule, and then click **Schedule**. If you click the service or resource links, the related form opens.

   The **Schedule Service Activity** form closes, and Microsoft Dynamics CRM fills in the information from the selected time into the **Service Activity** form.
6. On the **Service Activity** form, enter any additional information about the service activity.
   - **Subject**

     You must enter a subject.The first 12 characters appear on the Service calendar and the calendar in your **Workplace**.

     You can save the service activity now or continue to add information.
   - **Customers**

     If this service activity is for a customer, you can locate and select the account or contact. You can click the **Lookup** button to search for records or to select records.
   - **Resources**

Locate and select the user or facility or equipment that you want to schedule. You can click the **Lookup** button to search for records or to select records.

- **Location**

  Enter an address or room number where the service activity will occur.

- **Show Time As**

  If you want to change the initial status of the service activity, select a status from the list. If you select any of the statuses under **Scheduled**, that block of time on the schedule is set so that another service activity or appointment cannot conflict with it during automatic scheduling. Forced service activities and appointments might conflict.

- **Site**

  Changing the **Site** after you have selected a time for the service activity is not recommended. Resources are assigned to sites. If the selected resources are not available at the selected site, there might be conflicts. To record the specific room or address of the service activity, enter that information in the **Location** box on the **Service Activity** form.

Notes

You can add additional information about the customer and service activity in this area. For example, you could enter the symptoms of a problem, special requests by the customer, or any messages to pass on to the resources providing the service.

7. Under **Information**, click **Common**, and then select and locate a record in the **Regarding** box to link to this service activity. You can also set a **Priority** for the service activity, and indicate a **Category** and **Sub-Category**.
8. Click **Save** or **Save and Close**.

The service activity appears as a color block on the Service calendar, as well as on the calendar in the Workplace and Activities areas.

Tip

You can record a customer's preferences for a specific time, day, service, facility, equipment, and customer service representative in the customer record on the **Administration** tab. As you are scheduling a service activity, the customer's preference is displayed in the **Form Assistant** pane.

Notes

- Changing any information in the Scheduling Information area after you have selected a time for the service activity is not recommended. Doing so might cause conflicts in the schedule.
- In the list of possible service activity search results, you can click the Page Back arrow to initiate a new search. Paging back does not display the previous page.

Related Topics

Work with Service Activities 440

Schedule Service Activity 428

Find the next available time within a specific time period

Can I do this task?

This task requires permissions that are found in all default service scheduling security roles.More information about specific permissions and performing this task while offline: Service Scheduling Permissions

Use this procedure to find the next available time based on a specific date, or range of dates, within the next day, week, or month.

1. In the Navigation Pane, click **Service**, and then click **Service Calendar**.
2. In the **Actions** group, click **Schedule**.

   Note
   If you click **New**, and then **Service Activity**, you will create a service activity without checking for available times.
3. On the **Schedule Service Activity** form, you must enter the following information:
   - **Service**

     Locate and select the service you want to schedule. You can click the **Lookup** button to search for and select records.
4. Under Scheduling Information, select criteria for the times you want.
   - **Start Date**
     - To search for a time on a specific date, select **Specific Date**, and then enter the date you want.
     - To search within a range of dates, select **Range of Dates**, and then enter the **On or After** and **On or Before** dates. You can also select specific days of the week.
     - To search for times today, select **Today**.
     - You can also search for times based on dates relative to today, such as **Tomorrow**, **This Week**, or **Next Week**.
   - **Start Time**
     - To search for a specific time, select **Specific Time**, and then enter the specific time.
     - To search within a specific range of time, select **Range of Times**, and then enter the earliest and latest times you want the service activity to start.
     - You can also search for times based on the time of day, such as **Morning** or **Evening**.
   - **Duration**

     Do not clear the **Use Default Duration** check box and change the duration unless you want to schedule more time than the default duration of the service. The maximum duration of a service activity is 10 days.
5. Click **Find Available Times**. The next available times are displayed.
6. Under **Available Times**, click the start or end time of the time that you want to schedule, and then click **Schedule**. If you click the service or resource links, the related form opens.

The **Schedule Service Activity** form closes, and Microsoft Dynamics CRM fills in the information from the selected time into the **Service Activity** form.

7. On the Service Activity form, enter any additional information about the service activity.

   - **Subject**

     You must enter a subject.The first 12 characters appear on the Service calendar and the calendar in your **Workplace**.

     You can save the service activity now or continue to add information.

   - **Customers**

     If this service activity is for a customer, you can locate and select the account or contact. You can click the **Lookup** button to search for records or to select records.

   - **Resources**

     Locate and select the user or facility or equipment that you want to schedule. You can click the **Lookup** button to search for records or to select records.

   - **Location**

     Enter an address or room number where the service activity will occur.

   - **Show Time As**

     If you want to change the initial status of the service activity, select a status from the list. If you select any of the statuses under **Scheduled**, that block of time on the schedule is set so that another service activity or appointment cannot conflict with it during automatic scheduling. Forced service activities and appointments might conflict.

   - **Site**

     Changing the **Site** after you have selected a time for the service activity is not recommended. Resources are assigned to sites. If the selected resources are not available at the selected site, there might be conflicts. To record the specific room or address of the service activity, enter that information in the **Location** box on the **Service Activity** form.

   Notes

   You can add additional information about the customer and service activity in this area. For example, you could enter the symptoms of a problem, special requests by the customer, or any messages to pass on to the resources providing the service.

8. Under **Information**, click **Common**, and then select and locate a record in the **Regarding** box to link to this service activity. You can also set a **Priority** for the service activity, and indicate a **Category** and **Sub-Category**.

9. Click **Save** or **Save and Close**.

   The service activity appears as a color block on the Service calendar, as well as on the calendar in the Workplace and Activities areas.

Tip

You can record a customer's preferences for a specific time, day, service, facility, equipment, and customer service representative in the customer record on the **Administration** tab. As you are scheduling a service activity, the customer's preference is displayed in the **Form Assistant** pane.

Important

- Changing any information in the Scheduling Information area after you have selected a time for the service activity is not recommended. Doing so might cause conflicts in the schedule.
- In the list of possible service activity search results, you can click the Page Back arrow to initiate a new search. Paging back does not display the previous page.

Related Topics

Work with Service Activities 440

Navigating the Service Calendar 427

Find an available time with specific criteria

Can I do this task?

This task requires permissions that are found in all default service scheduling security roles.More information about specific permissions and performing this task while offline: Service Scheduling Permissions

Use this procedure to find the next available time based on a set of specific criteria. For example, if the customer wants your head mechanic to work on his bicycle, you can search the head mechanic's schedule for the next available time.

1. In the Navigation Pane, click **Service**, and then click **Service Calendar**.
2. In the **Actions** group, click **Schedule**.

   Note
   If you click **New**, and then **Service Activity**, you will create a service activity without checking for available times.
3. On the **Schedule Service Activity** form, you must enter the following information:

   - **Service**

     Locate and select the service you want to schedule. You can click the **Lookup** button to search for and select records.

   - **Duration**

     Do not clear the **Use Default Duration** check box and change the duration unless you want to schedule more time than the default duration of the service. The maximum duration of a service activity is 10 days.
4. Click **Find Available Times**. The next available times in the selected resource's schedule are displayed. If there is more than one page of records available to view in the list of records, use the **Page** arrows at the bottom of the list to view the additional pages.

5. Under **Available Times**, click the start or end time of the time that you want to schedule, and then click **Schedule**. If you click the service or resource links, the related form opens.

   The **Schedule Service Activity** form closes, and Microsoft Dynamics CRM fills in the information from the selected time into the **Service Activity** form.

6. On the Service Activity form, enter any additional information about the service activity.

   - **Subject**

     You must enter a subject. The first 12 characters appear on the Service calendar and the calendar in your **Workplace**.

     You can save the service activity now or continue to add information.

   - **Customers**

     If this service activity is for a customer, you can locate and select the account or contact. You can click the **Lookup** button to search for records or to select records.

   - **Location**

     Enter an address or room number where the service activity will occur.

   - **Show Time As**

     If you want to change the initial status of the service activity, select a status from the list. If you select any of the statuses under **Scheduled**, that block of time on the schedule is set so that another service activity or appointment cannot conflict with it during automatic scheduling. Forced service activities and appointments might conflict.

   - **Site**

     Changing the **Site** after you have selected a time for the service activity is not recommended. Resources are assigned to sites. If the selected resources are not available at the selected site, there might be conflicts. To record the specific room or address of the service activity, enter that information in the **Location** box on the **Service Activity** form.

   Notes

   You can add additional information about the customer and service activity in this area. For example, you could enter the symptoms of a problem, special requests by the customer, or any messages to pass on to the resources providing the service.

   Under **Information**, click **Common**, and then select and locate a record in the **Regarding** box to link to this service activity. You can also set a **Priority** for the service activity, and indicate a **Category** and **Sub-Category**.

7. Click **Save** or **Save and Close**.

   The service activity appears as a color block on the Service calendar, as well as on the calendar in the Workplace and Activities areas.

   Tip

   You can record a customer's preferences for a specific time, day, service, facility, equipment, and customer service representative in the customer record on the **Administration** tab. As you are scheduling a service activity, the customer's preference is displayed in the **Form Assistant** pane.

Notes

- Changing any information in the Scheduling Information area after you have selected a time for the service activity is not recommended. Doing so might cause conflicts in the schedule.
- In the list of possible service activity search results, you can click the Page Back arrow to initiate a new search. Paging back does not display the previous page.

Related Topics

Work with Service Activities 440
Navigating the Service Calendar 427

View a list of resources

Can I do this task?

This task requires permissions that are found in all default service scheduling security roles.More information about specific permissions and performing this task while offline: Service Scheduling Permissions

You can view a list of resources in the Service calendar area. The Service calendar includes a scalable, linear view of the resources' schedules.

1. In the Navigation Pane, click **Service**, and then click **Service Calendar**.
2. In the **Type** list, select the type of resource (user, resource, or facilities and equipment), and then in the **View** list, select the view of that resource that you want to see.
3. In the list of resources, you can do any of the following:
   - Click a letter on the alphabetical jump bar at the bottom of the list to go to that section of the list.
   - Expand the list pane by dragging the right edge to view additional columns of information.
   - Reverse the sort order of the list by clicking a column heading.
   - View general information about a single resource by selecting the resource in the list and then clicking the **Expand** button under the **Zoom** bar.

Related Topics

Service Calendar 427
Navigating the Service Calendar 427

Create a service activity without checking for conflicts

Can I do this task?

This task requires permissions that are found in all default service scheduling security roles.More information about specific permissions and performing this task while offline: Service Scheduling Permissions

If you save a service activity without finding available times in the schedule, then Microsoft Dynamics CRM displays the service activity in the schedule without checking for conflicts.

One reason to force a service activity into a time slot is to squeeze another service activity into the leftover time from a previous service activity.

1. In the Navigation Pane, click **Service**, and then click **Service Calendar**.
2. In the **New** group, click **Service Activity**.
3. On the **Service Activity** form, you must enter the following information:
   - **Subject**

     You must enter a subject.The first 12 characters appear on the Service calendar and the calendar in your **Workplace**.
   - **Service**

     Locate and select the service you want to schedule. You can click the **Lookup** button to search for and select records.
4. You can enter additional information about the service activity.
   - **Customers**

     If this service activity is for a customer, you can locate and select the account or contact. You can click the **Lookup** button to search for records or to select records.
   - **Resources**

     Locate and select the user or facility or equipment that you want to schedule. You can click the **Lookup** button to search for records or to select records.
   - **Location**

     Enter an address or room number where the service activity will occur.
   - **Show Time As**

     If you want to change the initial status of the service activity, select a status from the list. If you select any of the statuses under **Scheduled**, that block of time on the schedule is set so that another service activity or appointment cannot conflict with it during automatic scheduling. Forced service activities and appointments might conflict.
   - **Site**

     Locate and select the site for the service activity. Sites are defined in Microsoft Dynamics CRM and assigned to resources. Only resources from the same site will be selected. To record the specific room or address of the service activity, enter information in the **Location** box. You can click the **Lookup** button to search for records or to select records.
5. Under Scheduling Information, you must enter the Start Time and End Time, but the other information is optional.
   - **Start Time** and **End Time**

Select or type in the date and times the service activity starts and ends. The **Duration** box is updated to the length of the service activity. If you select a different duration, the **End Time** is adjusted. If you type in both the start and end times, the duration will change.

If this is an all-day event, click **All Day Event**. An all-day event is actually the entire working day of the selected resource. If the resource works 8 a.m. to noon, then an all-day event is four hours.

- **Duration**

  You can add additional time to the end of a time slot by changing the duration. The maximum duration of an activity is 10 days. The default duration is determined by the selected service.

- **Notes**

  You can add additional information about the customer and service activity in this area. For example, you could enter the symptoms of a problem, special requests by the customer, or any messages to pass on to the resources providing the service.

6. Under **Information**, click **Common**, and then select and locate a record in the **Regarding** box to link to this service activity. You can also set a **Priority** for the service activity, and indicate a **Category** and **Sub-Category**.
7. Click **Save** or **Save and Close**.

   The service activity appears as a color block on the Service calendar, as well as on the calendar in the Workplace and Activities areas.

   Tip
   You can record a customer's preferences for a specific time, day, service, facility, equipment, and customer service representative in the customer record on the **Administration** tab. As you are scheduling a service activity, the customer's preference is displayed in the **Form Assistant** pane.

   If at any time before you save this service activity you want to search the schedule for an available time, you can click **Schedule** in the **Actions** group to open the **Schedule Service Activity** dialog box.

Related Topics

Work with Service Activities 440
Navigating the Service Calendar 427

Find and view the work schedule for an individual resource

Can I do this task?

This task requires permissions that are found in all default service scheduling security roles.More information about specific permissions and performing this task while offline: Service Scheduling Permissions

1. In the Navigation Pane, click **Service**, and then click **Service Calendar**.
2. In the **Type** list, click **Resource**.

3. In the **Look for** box, type the name of the resource, or the last name of a user, and then click **Find**.

   You can use asterisks (*) as wildcards in your search.

   The search results appear in the list pane.

4. In the Service calendar, you can do the following:
   - To view current appointments and service activities for a resource, select the name from the list. The schedule appears in the schedule pane to the right of the list.
   - To view a specific date, select a date in the **Calendar** pane.
   - To quickly change the date range, use the **Zoom** controls at the bottom of the schedule pane.

5. To view work hours for a specific resource, follow these steps:
   a. In the list of resources, open the resource you want to view.

      The User or Facilities/Equipment form opens. If you have sufficient permssions, this form can be edited.

   b. On the User or Facilities/Equipment form, click **Work Hours**. The monthly calendar displays the start and end time for each day's schedule. If a schedule has not been set, or the resource is always available, the calendar displays **All Day**.

   c. To change the month you are viewing, at the top of the calendar, click the forward and back arrows on either side of the displayed month and year.

   d. To edit the schedule, double-click a date on the calendar. Change the schedule as needed.

Related Topics

Service Calendar 427
Navigating the Service Calendar 427

Reschedule a service activity

Can I do this task?

This task requires permissions that are found in all default service scheduling security roles.More information about specific permissions and performing this task while offline: Service Scheduling Permissions

1. In the Navigation Pane, click **Service**, and then click **Service Calendar**.
2. In the **Actions** group, click **Conflicts**.

   The button label changes to **Hide Conflicts** and any service activities, appointments, or resources that have scheduling conflicts are outlined in red.

Can I do this task?

This task requires permissions that are found in all default service scheduling security roles.More information about specific permissions and performing this task while offline: Service Scheduling Permissions

After a service activity is created, you can change the service activity status. The status of a service activity is displayed in the Service calendar and the Workplace calendar.

1. In the Navigation Pane, click **Service**, and then click **Service Calendar**.
2. On the Service calendar, select the service activity you want to change.
3. In the **Actions** group, click **Change Status**.
4. In the **Change Status** dialog box, in the **Show Time As** list, select the new status, and then click **OK**.

   The status of the service activity is updated and the color of the service activity time slot changes.

   Note
   When you close a service activity, the activity becomes read-only and cannot be edited.

Can I do this task?

This task requires permissions that are found in all default service scheduling security roles.More information about specific permissions and performing this task while offline: Service Scheduling Permissions

1. In the Navigation Pane, click **Service**, and then click **Service Calendar**.
2. Locate and select the service activity you want to reschedule.
3. In the **Actions** group, click **Reschedule**.
4. On the **Schedule Service Activity** form, change any of the information you want.
5. Click **Find Available Times**.
6. In the **Available Times** list, select a time slot.
7. Click **Schedule**.
8. Click **Save** or **Save and Close**.

   Note
   You cannot reopen closed service activities. To reactivate canceled service activities, on the **Actions** menu, click **Reactivate**. The service activity will be reopened and the status will be updated to Requested. If the time is no longer available, you may get a message. To reschedule the service activity for an available time, in the **Actions** group, click **Schedule**.

Related Topics

Schedule Service Activity 428
Navigating the Service Calendar 427

Schedule Service Activity

Use this form to search for an available time for a service activity. You can either search for an open time using search criteria that at a minimum includes selecting a service, or you can define a more complex set of criteria. You can also create a service activity without checking for conflicts in the scheduled service. The

service activity appears as a color block on the Service calendar, as well as on the calendar in the Workplace and Activities areas.

You cannot create a recurring service activity. Create individual service activities as appropriate.

Work with Service Activities

You can search for an available time to perform a service for a customer. Notices and reminders are not sent automatically to the customer or the resource providing the service.

Work with the Workplace Calendar

Use the Workplace calendar to view by the day, week, or month and to create and edit appointments and service activities.

View the calendar in the Workplace area

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

The Workplace calendar displays the appointments and service activities to which you are a participant.

1. In the Navigation Pane, click **Workplace**. Then, under **My Work**, click **Calendar**.
2. On the calendar, you can change the view by doing any of the following:
   - To change the calendar view, under **Calendar Views**, click one of the views:
     - **Month**

       The calendar displays a monthly calendar.
     - **Week**

       The calendar displays a 7-day week.
     - **Day**

       The calendar displays an hourly list for a single day.
   - To view a summary of an appointment, on the calendar, place the cursor over the appointment.
   - To view or edit the details of an appointment, on the calendar, click the appointment link. The **Appointment** form opens.
3. To change the dates displayed on the calendar, on the calendar control, click the arrows or a specific date.
4. To view today's appointments and service activities, on the calendar control, click **Today**. The calendar displays the hourly list for today.

5. To refresh the calendar, in the top right corner of the calendar, click the **Refresh** button .

Note
The calendar displays canceled and completed appointments and service activities. To remove an appointment or service activity from the calendar, delete the record.

Related Topics

Work with the Workplace Calendar 440
Service Calendar 427

Print the details of an activity from a calendar

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

You can print the details of an appointment or service activity from the Workplace calendar or the Service calendar.

1. Locate and open the appointment or service activity you want to print.
2. On the **File** tab, click **Print Preview**.
3. In the **Preview** dialog box, click **Print**.
4. In the **Print** dialog box, set the printing options you want, and then click **Print**.
5. On the Standard toolbar, click **Close**.

Note
To print the entire calendar as you see it in the window, click **Print** in Microsoft Internet Explorer.

Related Topics

Work with the Workplace Calendar 440
Print Things 19

Create or edit an appointment

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

You can modify any of the information in an open appointment. If you change the date and times of the appointment, Microsoft Dynamics CRM will recheck for schedule conflicts. The calendar displays canceled and completed appointments and service activities. To remove an appointment or service activity from the calendar, delete the record.

1. Create an appointment or a recurring appointment in:

   Calendar in Workplace

   a. In the Navigation Pane, click **Workplace**. Then, under **My Work**, click **Calendar**.

   b. Under **Create a New**, click **Appointment**.

   Service Calendar

   a. In the Navigation Pane, click **Service**, and then click **Service Calendar**.

   b. On the Actions toolbar, click **New**, and then click **Appointment**.

   Activities area

   a. In the Navigation Pane, click **Workplace**, and then under **My Work** click **Activities**.

   b. On the Actions toolbar, click **New**.

   c. In the **New Activity** dialog box, click **Appointment**, and then click **OK**.

2. In the **Appointment** dialog box, on the **Appointment** tab, you must enter information into the following fields:

   - **Subject**

     Type a description of the appointment. The first 12 characters appear in the Workplace calendar and Service calendar.

   - **Start Time**

     Type the date and time that the appointment begins.

   - **End Time**

     Type the date and time that the appointment ends. Microsoft Dynamics CRM automatically sets the appointment for a duration of 30 minutes starting on the next half hour.

   - **Required**

     To locate and select participants that must attend this appointment, click the box next to the label.

     You can click the **Lookup** button to search for and select records.

     Participants are not sent notification of new or updated appointments. In Microsoft Dynamics CRM for Outlook you can include recipients that are not contacts in Microsoft Dynamics CRM. The names are displayed as red text. Click the name that appears in red text to resolve so you can resolve it to an existing contact or account, or create a new record.

3. Add optional information.

   - To add **Optional** participants, click **Lookup** to search for records.
   - In the **Location** box, enter the room or address where the appointment will occur.

- In the **Show Time As** list, select how you want the appointment to appear on your calendar. If you select **Free** or **Tentative**, other appointments and service activities can be scheduled during that time.
- In the **Duration** box, record the time you spend on the activity. If this activity is related to a case and the case is linked to a contract line, the durations of all the activities for this case are tallied and updated automatically in the related active contract. The total, which includes the totals from any other cases relating to that contract, can be adjusted manually before billing the customer. The maximum duration of an appointment or service activity is 10 days.
- Click **All Day Event** if this event is for the entire time you are working. The appointment's duration will be the same as your working hours. For example, if your working hours are 9 a.m. to 6 p.m., then the duration of your appointment is 9 hours, but will display as "1 day".

4. On the **Notes and Activities** tab, click **Add a new note**, and then add the information that applies to your record.
5. On the **Common** tab, you can link the appointment to another Microsoft Dynamics CRM record and change the **Organizer**. If your business uses **Category** and **Sub-Category** to organize your business data, enter them on this tab.
6. If this is a recurring appointment, click **Recurrence** and select the time, pattern, and date range you want the appointment to recur.
7. Click **Save** or **Save and Close**.

   If one or more of the participants (including you as the originator) have a service activity or appointment during this time, a warning appears. You can click **Ignore and Save** to save the appointment anyway.

   The new appointment appears in the calendar and list of activities for the participants. If the owner is not a participant, the activity will not appear in his or her calendar.

   Notes

   - Appointments created in the Web application and synchronized with Microsoft Dynamics CRM for Outlook automatically set a 15-minute reminder and appear on the Outlook calendar. You can change the reminder in Outlook.
   - To re-open a canceled appointment, on the **Actions** menu, click **Reactivate**.

Related Topics

Work with the Workplace Calendar 440
Work with Appointments 440

Work with Appointments

Use this form to create, edit, or reschedule an appointment for an account, contact, facility/equipment, lead, or user. After you save this form, you can add attachments, check for duplicates, and convert this appointment to an opportunity or case.

Creating Contracts

Contracts document service level agreements (SLAs) and entitlements. This information includes the duration of the contract, how many case incidents or minutes of service purchased, what hours and days of the week coverage is available, and the service entitlements.

Work with Contracts

After you save a contract record, you can add contract lines, activities, attachments, and cases.

Create or edit a contract

Can I do this task?

This task requires permissions that are found in all default service security roles. More information about specific permissions and performing this task while offline: Service Permissions

You can edit an existing *draft* contract, but not invoiced or active contracts.

Note
Although it is possible, creating a contract from an account is not recommended. The contract does not associate to the account correctly and allotments are not recorded.

1. In the Navigation Pane, click **Service**, and then click **Contracts**.
2. Use one of the following procedures:

   Start a contract from a template

   The contract template determines the the allotment type (minutes or cases), billing frequency, discounts, and the day and times service is available; however, with the exception of allotment type, this information can be changed in the contract.

   a. On the Actions toolbar, click **New**.

   b. In the **Template Explorer** dialog box, select the template you want to use, and then click **OK**.

   c. In the contract form, in the **Contract Name** box, type a unique name for the contract.

      For example, *Adventureworks - technical support for wireless network*.

   Start a new contract by copying an existing contract

   Microsoft Dynamics CRM creates a copy of the contract with a unique ID number. Any changes you make to this copy do not affect the original contract.

   a. From the list, open the contract you want to copy.

   b. In the **Contract** form, on the **Actions** menu, click **Copy Contract**.

   c. In the **Copy Contract** dialog box, clear **Include canceled contract lines** unless you want to keep them, and then click **OK**.

In the original contract, contract lines were canceled when they expired or the allotment is exceeded. If you want to reuse the contract lines, do not clear the check box.

3. On the **General** tab, you must enter information in the following boxes:

   - **Contract Name**
   - **Customer**

     Select the customer covered by this contract. You can click the **Lookup** button to search for and select records.

   - **Contract Start Date**
   - **Contract End Date**

     When you save the contract,Microsoft Dynamics CRM automatically assigns the **Contract ID** and calculates the Duration in Days based on the contract start and end dates. A contract address is required to change the status of the contract to *invoiced*.

     In the Billing Information area, Microsoft Dynamics CRM autmoatically completes the fields when the corresponding Heading area fields are entered; however, you can change or enter the information as required. **Bill To Address** is required to change the status of the contract to *invoiced*.

     In the Pricing area, the amounts are read-only, and are calculated based on the pricing and discounts entered in the contract lines. To change the pricing, update the contract lines. To recalculate the amounts, in the **Actions** group, click **Recalculate**.

4. On the Details tab, enter additional information about the contract.

   In the Contract Type area, you can change the discount and service level. Discounts for contract lines are given the same discount type that you select here. Service levels are defined by your business's guidelines.

   In the History area, the following fields are automatically completed when the contract was created.

   - **Originating Contract**

     The contract that the current contract was copied from. This field cannot be changed.

   - **Owner**

     This box is filled automatically with the name of the user who is creating the record. You can click the **Lookup** button to search for other records.

   - **Contract Template**

     You can change the contract template, if the contract status is *draft*.

5. Under **Information**, click **Notes and Activities**. In the Notes section, click **Add a new note**, and add the information that applies to your record.
6. Click **Save** or **Save and Close**.
7. Resolve potential duplicate records.

   If the system detects that your record might be a potential duplicate, instead of saving the record, Microsoft Dynamics CRM displays the **Duplicates Detected** dialog box.

8. To open a record to make sure it is a potential duplicate, in the **Potential duplicate records** list, double-click the record.
   - If the duplicate-detection rule identified potential duplicate records in other record types, review records from each record type listed.
9. If your new or updated record is not a duplicate, to create the new record, click **Save Record**.

   - OR -

   If your new or updated record is a duplicate, to cancel your changes, click **Cancel**.

Notes

- If you enter a duplicate record within a few minutes of entering the first record, Microsoft Dynamics CRM will not detect the duplicate record. The matchcodes for new and updated records are created every five minutes, rather than as a record is created.
- Duplicate detection can take place only if duplicate detection is enabled in **Duplicate Detection Settings** and if at least one duplicate-detection rule exists for the record type. More information: *Avoiding Duplicate Records* (on page 69)

Notes

- The contract becomes active once it is invoiced and the start date is reached.
- You must define at least one contract line for the contract before you can change the status of the contract to *invoiced*. You can define several contract lines for each contract; for example, one for parts and another for maintenance. You cannot delete a contract line once it is active; instead, you can cancel it.
- The default days and hours of service are defined in the contract template. To change the days and hours of service, in the **Actions** group, click **Set Calendar**.
- You cannot edit an *active* contract, but you can cancel it or put it on hold. A canceled contract can be renewed and then edited. When a contract is *on hold*, no cases can be opened against the contract. For example, you might choose to put a contract on hold if there is an invoicing dispute, and then release the contract when the dispute is resolved. In the **Actions** group, click **Hold Contract** or **Release Hold**. To view a list of contracts on hold, in the **View** list, click **Contracts On Hold**.

Related Topics

Work with Contracts 444

Add or edit a contract line

Can I do this task?

This task requires a manager, vice president, CEO-Business Manager, System Administrator, or System Customizer security role or equivalent permissions. More information about specific permissions and performing this task while offline: Configuration Permissions

Adding contract lines to a contract is the second step in creating and invoicing a contract. Contract lines include specific dates, the product covered, and how many cases or total minutes of allotted support are provided. You can define several contract lines for each contract; for example, one line for parts and another for maintenance.

1. In the Navigation Pane, click **Service**, and then click **Contracts**.
2. In the contract list, open the service contract to which you want to add a contract line.
3. Under **Common**, click **Contract Lines**.
4. In the **Records** group, click **Add New Contract Line**.
5. On the **General** tab, you must enter information in the following fields:

   - **Title**

     This information should be a descriptive of the contents of the contract line. For example, if this line is for a specific product, include the name in the title.

   - **Start Date**
   - **End Date**

   Note

   Microsoft Dynamics CRM enters the **Start Date** and **End Date** for the line automatically based on the contract dates; however, you can change the dates as needed.

   - **Product**

     To locate and select a product, click the **Lookup** button.

   - **Total Cases/Minutes**

     Type the total case or minute allotment. The contract template determines the type of allotment (cases or minutes). As cases are opened against this contract, Microsoft Dynamics CRM displays the allotments used in the **Allotments Used** box.

   - **Total Price**

     You must enter the total price for this contract line.

6. On the **Administration** tab, you can change the customer and enter the serial number of a product. Microsoft Dynamics CRM automatically enters the customer in the **Customer** box based on the contract's customer. However, you can change the customer if needed.
7. Under **Information**, click **Notes and Activities**. In the Notes section, click **Add a new note**, and add the information that applies to your record.
8. Click **Save** or **Save and Close**.

   Notes

   - If cases have been opened against this contract, Microsoft Dynamics CRM tracks how much of the allotted support has been used in the **Allotment Details** area. You can change the **Total Cases/Minutes** to increase or decrease the allotment.
   - You can cancel a contract line only when it is set to Active. By canceling a contract line instead of deleting it, you can reuse the contract lines later if you renew the contract or create a new contract based on it. In the **Actions** group, click **Cancel Contract Line**. In the **Cancel Contract**

dialog box, in the **Cancellation Date** box, enter the date that you want to cancel the contract line, and then click **OK**.

Related Topics

Work with Contract Lines....444
Work with Contracts 444
Supporting Customer Service with Microsoft Dynamics CRM 451

Invoice and activate a contract

Can I do this task?

This task requires permissions that are found in all default service security roles. More information about specific permissions and performing this task while offline: Service Permissions

Microsoft Dynamics CRM does not automatically invoice the customer or create an actual invoice unless your business has integrated Microsoft Dynamics CRM with a Microsoft BackOffice product. The invoice record displays information about the invoice, not the invoice itself.

When a contract is marked as invoiced, the status changes to *Invoiced* until the start date. Then, the status changes to *Active*.

1. In the Navigation Pane, click **Service**, and then click **Contracts**.
2. In the list of contracts, open the service contract that you want to invoice.
3. In the **Actions** group, click **Invoice Contract**.

   The status is listed in the **Status** column in the contract list. The invoice record is displayed in the **Invoice** list.

   Note
   After a contract is marked as invoiced, you cannot delete the contract or change any contract information, such as the dates, contract names, or the contract ID. You can add new contract lines and cancel existing contract lines.

Related Topics

Work with Contracts 444

Cancel or delete a contract

Can I do this task?

This task requires a manager, vice president, CEO-Business Manager, System Administrator, or System Customizer security role or equivalent permissions. More information about specific permissions and performing this task while offline: Configuration Permissions

1. In the Navigation Pane, click **Service**, and then click **Contracts**.
2. In the list of contracts, open the service contract that you want to cancel or delete.
3. To cancel a contract, in the **Actions** group, click **Cancel Contract**. In the **Cancel Contract** dialog box, type the cancellation date.

   - OR -

   To delete a contract, in the **Save** group, click **Delete**.
4. Click **OK**.

Note

- You can view canceled contracts in the **Canceled Contracts** view.
- If you want to temporarily cancel a contract, you can put the contract "on hold." When a contract is *on hold*, no cases can be opened against the contract. For example, you might choose to put a contract on hold if there is an invoicing dispute, and then release the contract when the dispute is resolved. In the **Actions** group, click **Hold Contract** or **Release Hold**. To view a list of contracts on hold, in the **View** list, click **Contracts On Hold**.

Related Topics

Work with Contracts 444
Supporting Customer Service with Microsoft Dynamics CRM 451

Renew a contract

Can I do this task?

This task requires permissions that are found in all default service security roles. More information about specific permissions and performing this task while offline: Service Permissions

1. In the Navigation Pane, click **Service**, and then click **Contracts**.
2. In the **View** list, click **Expired Contracts**.
3. In the list of contracts, open the expired or invoiced contract that you want to renew.
4. In the contract form, in the **Actions** group, click **Renew Contract**.
5. If you do not want to include canceled contract lines, in the **Renew Contract** dialog box, clear the **Include canceled contract lines** check box, and then click **OK**.

   Microsoft Dynamics CRM makes a copy of the contract and sets the status to either *Draft* for copies of expired contracts or *Invoiced* for copies of invoiced contracts. The start date is set for one day after the existing contract expires.
6. Make any changes that are necessary.

7. Click **Save** or **Save and Close**.

Related Topics

Work with Contracts 444

Use the Closed Activity list

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Sales Permissions

Many record types allow for activities to be associated with them. For example, an opportunity might have an associated phone call activity. When you close any associated activity as completed, that activity shows up in the record history of the associated record. To view the record history, in the record, under **Common**, click **Closed Activities**.

You can do the following in the **Closed Activities** list:

- While the record is in draft form, you can create a new activity for this record by clicking the **New Activity** button. You can no longer do this when the record is activated. Note that even though you create this activity from the **Closed Activities** list, it will be displayed in the **Activities** list while it is active. It will be displayed in the **Closed Activities** list after you set the status to completed.
- You can also do standard tasks such as printing, exporting data, running a report, or assigning. For information about doing those tasks, see the topic What else can I do? More tasks...

The **Closed Activities** list for opportunities, accounts, and contacts includes two lists that help you narrow down the number of completed activities:

- To narrow down the list to a certain time period, such as Last 30 days, click **Filter on**.
- To see completed activities for one particular record, click **Include**, and then select **This Record Only**.
- To create a list of activities that are related to any record associated with the account or contact, select **Related Regarding Records**.

Related Topics

Manage Activities 23

Work with Contract Lines

After you save a contract line, you can add cases and workflow jobs.

Supporting Customer Service with Microsoft Dynamics CRM

Microsoft Dynamics CRM includes a set of features that work together to help you track and record your customer service activities.

Work with Cases

After you save a case, you can add an activity, an attachment, or a system job.

As the first step of resolving a case, you can view the total amount of time spent on that case. You can view this information without actually resolving the case.

How to assign a case to the queue

1. In the Navigation Pane, click **Service**, and then click **Cases**.
2. In the list of cases, select the case that you want to add to a queue.

   Or, select multiple records

   - Select several records by pressing the CTRL key while you click each record.
   - Select a sequence of records by clicking the first record that you want, and then press the SHIFT key while you select the last record that you want.
   - Select all records on the page by selecting the **Select/clear all records on this page** check box at the top of the list.

   By default, the Microsoft Dynamics CRM Web application displays 50 records per page. You can increase this up to a maximum of 250 records per page to increase the number of records you can select at one time. To increase the number of records displayed per page:

   1. On the **File** menu, click **Options**.
   2. On the **General** tab, in the **Records Per Page** list, select the number of records to display per page.
   3. Click **OK**.

   This changes the number of items that is displayed for all lists, which may slow response time when you switch record types. Therefore, you might want to set it back to a smaller number when you are done with this bulk action.
3. In the **Collaborate** group, click **Add to Queue**.
4. Click the **Lookup** button , and select the queue that you want to add the case to, and then click **OK**.
5. Click **OK**.

Work on a queue item

Follow these steps to assign a case, activity, or other record in the Queues list to yourself, or to another user.

1. In the Navigation Pane, click **Workplace**, and then under **My Work**, click **Queues**.
2. On the Actions toolbar, in the **Queue Items** drop-down list, select **Items available to work on**.
3. In the list, select one or more queue items that you want to assign.
4. On the **Queue Items** tab, click the **Work On** button.
5. In the **Assign Queued Items** dialog box, do one of the following:
   - To assign the selected items to yourself, select the **Assign to me to work on** radio button. Click **OK** to close the dialog box.
   - To assign the selected item to another user:

   a. Select the **Assign to another user to work on** radio button.

   b. Click the **Lookup** button .

   c. In the **Look Up Record** dialog box, in the **View** drop-down box, select the view you want.

   d. In the **Search** box, type part or all of the name you want, and then click the **Search for** icon.

   e. In the list, select the name you want. Click **OK** to close the dialog box and save the name.

   f. Click **OK** to close the **Assign Queued Items** dialog box.
6. If you assigned the queue item to yourself, it is now available for you to work on. You can see all items assigned to you in the **Items I am working on** view.

Release a work item

This topic is pre-release documentation and is subject to change in future releases. Blank topics are included as placeholders.

Can I do this task?

This task requires permissions that are found in all default service security roles. More information about specific permissions and performing this task while offline: Service Permissions

1. In the Navigation Pane, click **Workplace**. Then under **My Work**, click **Queues**.
2. Select the record for which you want to view the queue item details, and in the **Actions** group, click **Queue Item Details**.

Alternatively, open the case or activity record for which you want to view the queue item details, and then in the **Collaborate** group, click **Queue Item Details**.

Note
A record can be added to multiple queues but only one queue item is active at any point. If you try to view the queue item details from a record and if the record is in multiple queues, the message "This record is in multiple queues. Go to the specific queue to view the details." appears. Navigate to the

list of queue records to view the queue item details of the active queue item or use Advanced Find to identify the active queue item.

Create and Publish Articles

View unpublished articles

Can I do this task?

This task requires a manager, vice president, CEO-Business Manager, System Administrator, or System Customizer security role or equivalent permissions. More information about specific permissions and performing this task while offline: Service Permissions

3. In the Navigation Pane, click **Service**, and then click **Articles**.
4. In the **Articles** area, you can do any of the following:
   - View a list of articles.

     The list of articles is displayed in the right pane.
   - Sort the articles.

     In the list of articles, click a column heading to sort by that column. For example, to sort by title, click **Title**. To reverse the sort order, click the column heading a second time.
   - View an article and comments.

   g. On the **Articles** tab, click the **Download Web Service Description Files**, **Unapproved Articles**, or **Published Articles** folder, and then open the article with the comments you want to read.

      a. In the article form, click the **Add Article Comment** tab.

   h. In the list, open the comment you want to read or append.

   i. When you finish, click **OK** to close the comment.

Important
When you add a new article or comment, you cannot search for it until the catalog index is updated. Microsoft Dynamics CRM updates the catalog index automatically every 15 minutes. To update the results list, click the **Refresh** button .

Note
You can also view articles in the **Workplace** area, under **My Work**.

Related Topics

Work with Published Articles 223
Create and Publish Articles 453

Create an article

Can I do this task?

This task requires permissions that are found in all default service security roles. More information about specific permissions and performing this task while offline: Service Permissions

1. In the Navigation Pane, click **Service**, and then click **Articles**.
2. In the **Records** group, click **New**.
3. In the **Select a Template** dialog box, click the template that you want to use, and then click **OK**.
4. In the **Title** box, type a title for the article.
5. In the **Subject** box, click the **Lookup** button .
6. In the **Subject Lookup** dialog box, select the subject you want, and then click **OK**.

   If the subject you want does not appear in the list, contact your system administrator to add it.
7. In the **Key Words** dialog box, type the keywords that are relevant to this article and separate each keyword with a comma. To increase the likelihood that the words users search with will return the right articles, include alternate spellings and terminology in the keywords, such as *bike*, *bicycle*, and *trike*.
8. To write the content, click in a section of the form and begin typing.

   Tips

   - Use the editing tools on the Formatting toolbar to format your work.
   - Double-quotes are converted to single quotes. Enter two sets of double-quotes to display double-quotes.
   - There is no spell check built into Microsoft Dynamics CRM. There might be third-party solutions available. For more information, visit *Microsoft Dynamics CRM Solution Finder* (see Microsoft Dynamics CRM Solution Finder - *http://go.microsoft.com/fwlink/?LinkId=98752*).
9. Click **Save** or **Save and Close**.

   The article will appear in the **Draft Articles** view in the Articles area.

   Notes

   - You cannot attach files to articles.
   - You cannot upload or import articles, but you can copy and paste text from Microsoft Office Word and retain most of the formatting.

Related Topics

Work with Published Articles 223

Create and Publish Articles 453

Edit an article

Can I do this task?

This task requires a manager, vice president, CEO-Business Manager, System Administrator, or System Customizer security role or equivalent permissions. More information about specific permissions and performing this task while offline: Service Permissions

During editing, the article is not available. After making changes, you must have the article approved and republished.

1. In the Navigation Pane, click **Service**, and then click **Articles**.
2. Do one of the following:

   Select a published article

   a. On the **Articles** tab, click the **Published Articles** folder and select the article that you want to edit.

   j. On the Actions toolbar, click **Unpublish**.
3. In the confirmation message, click **OK**.

   Microsoft Dynamics CRM moves the article from the **Published Articles** folder to the **Unapproved Articles** folder. There you can revise and resubmit the article for approval and publication.

   Select an unpublished article

   a. On the **Articles** tab, click the **Download Web Service Description Files** folder or **Unapproved Articles** folder to display the list of articles.

   k. Open the article that contains the content you want to change.
4. In the **Title** box, type a title for the article.
5. In the **Subject** box, click the **Lookup** button .
6. In the **Subject Lookup** dialog box, select the subject you want, and then click **OK**.

   If the subject you want does not appear in the list, contact your system administrator to add it.
7. In the **Key Words** dialog box, type the keywords that are relevant to this article and separate each keyword with a comma. To increase the likelihood that the words users search with will return the right articles, include alternate spellings and terminology in the keywords, such as *bike*, *bicycle*, and *trike*.
8. To write the content, click in a section of the form and begin typing.

   Tips

   - Use the editing tools on the Formatting toolbar to format your work.
   - Double-quotes are converted to single quotes. Enter two sets of double-quotes to display double-quotes.
   - There is no spell check built into Microsoft Dynamics CRM. There might be third-party solutions available. For more information, visit *Microsoft Dynamics CRM Solution Finder* (see Microsoft Dynamics CRM Solution Finder - *http://go.microsoft.com/fwlink/?LinkId=98752*).

9. Click **Save** or **Save and Close**.

Related Topics

Create and Publish Articles 453

Submit an article for approval

Can I do this task?

This task requires permissions that are found in all default service security roles. More information about specific permissions and performing this task while offline: Service Permissions

1. In the Navigation Pane, click **Service**, and then click **Articles**.
2. In the **Articles** list, select the **Draft Articles** view, and then select the article that you want to submit for approval.
3. In the **Actions** group, click **Submit**.
4. In the confirmation message, click **OK**.

Related Topics

Create and Publish Articles 453

Approve and publish, or reject an article

1. In the Navigation Pane, click **Service**, and then click **Articles**.
2. In the **Articles** list, click **Unapproved Articles**.
3. In the list of unapproved articles, open an article that is pending approval.
4. After you have reviewed the article, in the **Actions** group, do one of the following:
   - To approve the article, click **Approve**, and then click **Close**.

     - OR -
   - To reject the article, click **Reject**.
5. If you reject the article, the **Provide a Reason** dialog box appears. Type a comment or explanation to the author in the box, and then click **OK**.
6. Click **Save** or **Save and Close**.

Notes

- Microsoft Dynamics CRM moves the approved article into the **Published Articles** view in the **Articles** area.
- Rejected articles are returned to the **Unapproved Articles** view for revision.
- When you approve an article, it is automatically published and will be available for viewing in the knowledge base in approximately 15 minutes.

Related Topics

Create and Publish Articles 453

Unpublish an article

Can I do this task?

This task requires a manager, vice president, CEO-Business Manager, System Administrator, or System Customizer security role or equivalent permissions. More information about specific permissions and performing this task while offline: Service Permissions

If you decide that an article is obsolete or incorrect, you can make it unavailable temporarily, make any changes, and then republish it. Articles can also remain unapproved or unpublished indefinitely. You can delete only unapproved articles. To delete a published article, you must unpublish it first.

1. In the Navigation Pane, click **Service**, and then click **Articles**.
2. In the **Articles** list, select the **Published Articles** view, and then select the article that you want to remove from the list.
3. In the **Actions** group, click **Unpublish**.
4. In the confirmation message, click **OK**.

   Microsoft Dynamics CRM moves the article from the **Published Articles** folder to the **Unapproved Articles** folder. There you can revise and resubmit the article for approval and publication.

Related Topics

Create and Publish Articles 453

Work with Published Articles

You can search or browse the Articles library for published articles. You can also view articles, print articles, or e-mail them to customers. More information: *Create and Publish Articles* (on page 453)

Using Microsoft Dynamics CRM for Outlook

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: E-mail Permissions

Before installing Microsoft Dynamics CRM for Microsoft Office Outlook, read the Installation Chapter included on the *Download page* http://go.microsoft.com/fwlink/?LinkId=208675.

The Microsoft Dynamics CRM for Microsoft Office Outlook is included on the Microsoft Dynamics CRM Client CD, and then installed and run on the Microsoft Dynamics CRM server.

1. Insert the Microsoft Dynamics CRM Client CD, and double-click Setup.exe.
2. On the Microsoft Dynamics CRM Setup screen, click Microsoft Dynamics CRM for Microsoft Office Outlook, click and follow the instructions in the Setup wizard.

   Important
   After installing Microsoft Dynamics CRM for Outlook, there are options that need to be set to enable you to send and receive e-mail from Outlook for Microsoft Dynamics CRM and to determine what data is synchronized.

   More information: Work with Your User Record and Work Hours, *Set Personal Options* (on page 201)

Related Topics

Doing CRM Work in Outlook 459

Doing CRM Work in Outlook

Microsoft Dynamics CRM for Microsoft Office Outlook is an add-in for Outlook that is installed on your desktop or laptop computer.

Perform most of the same sales, marketing, and customer services in Microsoft Dynamics CRM for Microsoft Office Outlook that you can in Microsoft Dynamics CRM. This includes working with accounts, contacts, and campaigns. The Microsoft Dynamics CRM address book gives you access to all the e-mail addresses for your Microsoft Dynamics CRM customers.

Not all Microsoft Dynamics CRM features are available when you are working offline.

More information: Install Microsoft Dynamics CRM for Outlook, Access Microsoft Dynamics CRM areas in Outlook, Microsoft Dynamics CRM Online Areas

Working with E-mail Activities in Outlook

If you prefer to work with your e-mail activities in Outlook, you can create and manage e-mail messages using Microsoft Dynamics CRM for Outlook. By using the Microsoft Dynamics CRM Address Book in Outlook, you have access to the e-mail addresses of your customers and other users in your organization.

More information: *Sending and Receiving E-mail in Microsoft Dynamics CRM for Outlook* (on page 185)

You can save all or some of your Outlook e-mail messages as Microsoft Dynamics CRM records. Microsoft Dynamics CRM for Outlook can check incoming e-mail for messages to save and track. This option can be set in the Personal Options dialog box. More information: *Set Personal Options* (on page 201)

Create a Record in Outlook

Create or edit a contact in Outlook

By default, new contacts that are created in Microsoft Dynamics CRM for Outlook are updated in Microsoft Dynamics CRM immediately. Outlook is updated every 15 minutes. The option to synchronize contacts is on by default. When you create a new contact, the Outlook forms open. You can decide whether an Outlook or Microsoft Dynamics CRM form opens. You can change your options in your personal options settings.

More information: *Set Personal Options* (on page 201), *Synchronizing Information* (on page 484)

1. Start Outlook. (Microsoft Dynamics CRM for Outlook must be installed.)
2. Do one of the following:

   Create a contact in an Outlook form

   a. On the Microsoft Office Outlook Standard toolbar, click **New**.

   b. On the **New** menu, click **Contact**.

      You might need to expand the menu. For more information, see Outlook Help.

   c. On the Microsoft Dynamics CRM toolbar, click **Track in CRM**.

      After you save the record, the **View in CRM** button becomes available.

   d. Do one of the following to locate and select a parent record to link to this record:

      - In Microsoft Office Outlook 2003, click **Regarding**.
      - In Microsoft Office Outlook 2007, click **Set Parent** or **Set Regarding**.

   e. Click **Save** or **Save and Close**.

      The contact appears in your Microsoft Dynamics CRM Contact folder in Outlook. The icon changes to the **Track in CRM** button . The contact is saved as a Microsoft Dynamics CRM contact and appears in the Microsoft Dynamics CRM Contacts area.

      When the contact was entered, the full name of the contact was used. When the record is saved to Microsoft Dynamics CRM, the name is separated into the first name and last name.

To open the Microsoft Dynamics CRM contact to add or edit information, such as activities and addresses, click **View in CRM**. The new contact is copied to the Microsoft Dynamics CRM server immediately. Whether or not the Outlook Company field is copied to the Parent field is an option set by your organization. For more information, contact your system administrator.

Create a contact in a Microsoft Dynamics CRM form

If you have selected to not synchronize contacts, these contacts only appear in the Microsoft Dynamics CRM folders in Outlook.

You can edit a contact by following steps 1 and 2 to navigate to the **My Work** area in Microsoft Dynamics CRM for Outlook. Then, open the record you want to edit.

a. In the Outlook Navigation Pane, click the button for your organization, and then expand **Workplace**.

b. Under **My Work**, click **Contacts**.

c. On the **Actions** menu, click **New**.

d. On the **General** tab, you must enter the following information.

- **Last Name**

  The last name of the contact is the minimum amount of information required.

- **First Name**

  Enter the contact's full first name. Nicknames can be entered on the **Notes and Activities** tab.

e. You can enter more information on these tabs:

- On the **Common** tab, you can enter information about the contact's role in their company and personal information about them.
- On the **Administration** tab, you can change the owner of this contact. You can also enter billing information; the preferred method of contact (such as by e-mail or phone); and whether or not they want to receive marketing material.
- Under **Information**, click **Notes and Activities**. In the Notes section, click **Add a new note**, and add the information that applies to your record.

f. Click **Save** or **Save and Close**.

Resolve potential duplicate records.

If the system detects that your record might be a potential duplicate, instead of saving the record, Microsoft Dynamics CRM displays the **Duplicates Detected** dialog box.

g. To open a record to make sure it is a potential duplicate, in the **Potential duplicate records** list, double-click the record.

- If the duplicate-detection rule identified potential duplicate records in other record types, review records from each record type listed.

h. If your new or updated record is not a duplicate, to create the new record, click **Save Record**.

- OR -

If your new or updated record is a duplicate, to cancel your changes, click **Cancel**.

Notes

- If you enter a duplicate record within a few minutes of entering the first record, Microsoft Dynamics CRM will not detect the duplicate record. The matchcodes for new and updated records are created every five minutes, rather than as a record is created.
- Duplicate detection can take place only if duplicate detection is enabled in **Duplicate Detection Settings** and if at least one duplicate-detection rule exists for the record type. More information: *Avoiding Duplicate Records* (on page 69)

Notes

- If you delete a contact that you own in Microsoft Dynamics CRM or in Outlook, the record is not deleted in the other application. If a contact that you do not own is deleted in Microsoft Dynamics CRM, then it is deleted in Outlook.
- Microsoft Dynamics CRM checks for duplicate records when records are created. Duplicates are not detected if you are offline. Duplicate detection may also occur when you synchronize or go back online.

Resolve potential duplicate records.

If the system detects that your record might be a potential duplicate, instead of saving the record, Microsoft Dynamics CRM displays the **Duplicates Detected** dialog box.

1. To open a record to make sure it is a potential duplicate, in the **Potential duplicate records** list, double-click the record.
   - If the duplicate-detection rule identified potential duplicate records in other record types, review records from each record type listed.
2. If your new or updated record is not a duplicate, to create the new record, click **Save Record**.

   - OR -

   If your new or updated record is a duplicate, to cancel your changes, click **Cancel**.

Notes

- If you enter a duplicate record within a few minutes of entering the first record, Microsoft Dynamics CRM will not detect the duplicate record. The matchcodes for new and updated records are created every five minutes, rather than as a record is created.
- Duplicate detection can take place only if duplicate detection is enabled in **Duplicate Detection Settings** and if at least one duplicate-detection rule exists for the record type. More information: *Avoiding Duplicate Records* (on page 69)

Related Topics

Create a Record in Outlook.....460

Save Outlook Contacts, Tasks, and E-mail Messages as Microsoft Dynamics CRM Records 465

Save Outlook contacts as Microsoft CRM contacts

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

You can save Outlook contacts as new Microsoft Dynamics CRM contacts. You can link the newly saved record to another Microsoft Dynamics CRM record, such as an account or contact.

1. Start Outlook. (Microsoft Dynamics CRM for Outlook must be installed.)
2. In the Outlook contacts folder, select up to 20 contacts.
3. If you have Outlook 2007 installed, on the **CRM Toolbar**, click **Track in CRM**.

   - OR -

   If you have Outlook 2010 installed, in the **CRM** group, click **Track**.

   In the Outlook Contacts folder, if the contacts are displayed in a list, the **Tracked in CRM** icon is displayed and indicates that the contact is tracked.

   The contacts appear in the **Contacts** area in Microsoft Dynamics CRM.
4. To link the contacts to a parent record, in Outlook, in the **CRM** group, click **Set Parent**. Click the type of record. In the **Look Up Record** dialog box, click the record that you want, and then click **OK**.

   Tip
   Click **Regarding**, **Set Regarding**, or **Set Parent** first, and **Track in CRM** is automatically activated.

   Notes
   - Duplicate detection identifies duplicate records when a record is tracked. Microsoft Dynamics CRM also checks for duplicates when you synchronize or go back online.

Resolve potential duplicate records.

If the system detects that your record might be a potential duplicate, instead of saving the record, Microsoft Dynamics CRM displays the **Duplicates Detected** dialog box.

1. To open a record to make sure it is a potential duplicate, in the **Potential duplicate records** list, double-click the record.

   ▸ If the duplicate-detection rule identified potential duplicate records in other record types, review records from each record type listed.
2. If your new or updated record is not a duplicate, to create the new record, click **Save Record**.

   - OR -

   If your new or updated record is a duplicate, to cancel your changes, click **Cancel**.

Notes

- If you enter a duplicate record within a few minutes of entering the first record, Microsoft Dynamics CRM will not detect the duplicate record. The matchcodes for new and updated records are created every five minutes, rather than as a record is created.
- Duplicate detection can take place only if duplicate detection is enabled in **Duplicate Detection Settings** and if at least one duplicate-detection rule exists for the record type. More information: *Avoiding Duplicate Records* (on page 69)

- To add additional information to the **Contact** form in Microsoft Dynamics CRM, click the contact in Outlook and then, in the **CRM** group, click **View in CRM**.
- If the contact is linked to a parent record, you can open the parent record from the Outlook contact record. In the Outlook contacts list, click or open the record. In the **CRM** group, click **View Parent**.
- The **Company** field in an Outlook contact is not automatically added to the parent account of the new Microsoft Dynamics CRM contact. More information: *Set Personal Options* (on page 201)

Related Topics

Create a Record in Outlook 460
Save Outlook Contacts, Tasks, and E-mail Messages as Microsoft Dynamics CRM Records 465
Sending and Receiving E-mail in Microsoft Dynamics CRM for Outlook 185
Work with E-mail Templates 187
Managing E-mail Activities 184

Create a new contact in Microsoft Dynamics CRM

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

You can create the same records in Microsoft Dynamics CRM for Outlook that you can in Microsoft Dynamics CRM by using the same familiar forms.

1. Start Outlook. (Microsoft Dynamics CRM for Outlook must be installed.)
2. If you have Outlook 2007 installed, on the **CRM Toolbar**, click **New Record**, and then click the type of record that you want to create.

   - OR -

   If you have Outlook 2010 installed, click the **CRM** tab. In the **New** group, click the type of record that you want to create.
3. Complete the form as needed.
4. Click **Save** or **Save and Close**.

To edit a record, in the Navigation Pane in Outlook, navigate to the area, such as **Sales**, where the records are located. Click **Accounts** or **Contacts**, and then open the record that you want to edit.

Note

- Duplicates are not detected if you are offline. Duplicate detection may also occur when you synchronize or go back online.

Resolve potential duplicate records.

If the system detects that your record might be a potential duplicate, instead of saving the record, Microsoft Dynamics CRM displays the **Duplicates Detected** dialog box.

1. To open a record to make sure it is a potential duplicate, in the **Potential duplicate records** list, double-click the record.
   - If the duplicate-detection rule identified potential duplicate records in other record types, review records from each record type listed.
2. If your new or updated record is not a duplicate, to create the new record, click **Save Record**.

   - OR -

   If your new or updated record is a duplicate, to cancel your changes, click **Cancel**.

Notes

- If you enter a duplicate record within a few minutes of entering the first record, Microsoft Dynamics CRM will not detect the duplicate record. The matchcodes for new and updated records are created every five minutes, rather than as a record is created.
- Duplicate detection can take place only if duplicate detection is enabled in **Duplicate Detection Settings** and if at least one duplicate-detection rule exists for the record type. More information: *Avoiding Duplicate Records* (on page 69)

Related Topics

Create a Record in Outlook 460
Save Outlook Contacts, Tasks, and E-mail Messages as Microsoft Dynamics CRM Records 465
Create an Activity in Outlook 460

Create an Activity in Outlook

Create or edit a task or appointment in Outlook

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: E-mail Permissions

You can create or edit tasks and appointments in Outlook using either the Microsoft Dynamics CRM forms or the Outlook forms. If you have selected to synchronize your appointments and tasks to your default Outlook folders, when you create a new appointment or task, the Outlook forms open.

Tip

To view your synchronization options for Microsoft Dynamics CRM for Outlook, on the Microsoft Dynamics CRM menu bar, click **Options**, and then click the **Synchronization** tab.

Everyone who was invited to the appointment (required and optional) can view the appointment in their Microsoft Dynamics CRM calendars and in My Activities views.

1. Start Outlook. (Microsoft Dynamics CRM for Outlook must be installed.)

2. Do one of the following:

   Create an appointment in an Outlook form

   1. On the Microsoft Office Outlook Standard toolbar, click **New**.
   2. On the **New** menu, click **Appointment**.

      For more information, see Outlook Help.
   3. On the Microsoft Dynamics CRM toolbar, click **Track in CRM**.

      After you save the record, the **View in CRM** button becomes available.
   4. Do one of the following to locate and select a parent record to link to this record:
      - In Microsoft Office Outlook 2003, click **Regarding**.
      - In Microsoft Office Outlook 2007, click **Set Parent** or **Set Regarding**.
   5. Click **Save** or **Save and Close**.

   The activity appears in your Outlook folders. The icon changes to the **Tracked in CRM** icon . If reminders were set up for appointments created in Microsoft Dynamics CRM for Outlook, they will be observed. A new Microsoft Dynamics CRM appointment activity is created and appears in the Microsoft Dynamics CRM Activities and Queues areas.

   Tip

   To open the Microsoft Dynamics CRM activity to add or edit information, click **View in CRM**.

   Create a task in an Outlook form

   1. On the Microsoft Office Outlook Standard toolbar, click **New**.
   2. On the **New** menu, click **Task**.

      For more information, see Outlook Help.
   3. On the Microsoft Dynamics CRM toolbar, click **Track in CRM**, and then click the type of Microsoft Dynamics CRM activity you want to create. You can create a task, letter, fax, or phone call activity that will be linked to the Outlook task.

      After you save the record, the **View in CRM** button becomes available.
   4. Do one of the following to locate and select a parent record to link to this record:
      - In Microsoft Office Outlook 2003, click **Regarding**.
      - In Microsoft Office Outlook 2007, click **Set Parent** or **Set Regarding**.
   5. Click **Save** or **Save and Close**.

      The activity appears in your Outlook folders. The icon changes to the **Tracked in CRM** icon . If reminders were set up for appointments and tasks created in Microsoft Dynamics CRM for Outlook, they will be observed. A new Microsoft Dynamics CRM task or appointment activity is created and appears in the Microsoft Dynamics CRM Activities and Queues areas. When your local data synchronizes, the new activities will be copied to the Microsoft Dynamics CRM server.

      Tip

To open the Microsoft Dynamics CRM activity to add or edit additional information, click **View in CRM**.

Create a task or an appointment in a Microsoft Dynamics CRM form

1. In the Outlook Navigation Pane, click the button for your organization, and then expand **Workplace**.
2. Under **Workplace**, expand **My Work**, and then click **Activities**.
3. On the Actions toolbar, click **New**.
4. In the **New Activity** dialog box, click **Task** or **Appointment**, and then click **OK**.
5. Enter the information that you want. You must enter any required information. In addition, at a minimum, entering information in the following boxes is useful when you or others in your organization refer to the activity later.
   - **Subject**

     You can quickly sort on the subject when you view activities.
   - **Owner**

     Microsoft Dynamics CRM automatically fills this box with your name. You can locate and select another owner. The activity appears in their Activity area.
   - **Duration**

     If this activity is related to a case, make sure that you record the time you spend on the activity in this box. If the case is linked to a contract line, the durations of all the activities for this case are tallied and updated automatically in the related active contract. The total, which includes the totals from any other cases relating to that contract, can be adjusted manually before billing the customer.
   - **Due**

     Enter the date and time that the activity is expected to take place or be completed. You can quickly sort on the **Due** field when you view activities.
6. Click **Save** or **Save and Close**.

   After records are synchronized, appointment reminders are automatically set up in Outlook for 15 minutes prior to the appointment. Tasks created in the Web application or created for an appointment today do not generate reminders.

Notes

- If the duration of an activity is more than 60 minutes (an hour), the value you enter is converted into hours. For example, 70 minutes is converted into 1.17 hours. When the activity is saved, the value is rounded up and might change from the entry that was originally displayed when it was converted from minutes into hours. Note that rounding is only observed on the hundredth of an hour. The exact value for the duration, however, is stored in the database in minutes, and this value is used to calculate the total billing time when resolving cases.
- When you create recurring appointments or tasks in Outlook, only the first 10 items are synchronized in your Microsoft Dynamics CRM calendar. This number is set by your system administrator.

- Attachments to Outlook tasks and appointments are not synchronized with Microsoft Dynamics CRM, but continue to be attached with the original item. To attach an item with the activity, save the file to the local drive of your computer, and then manually add the attachment.

Related Topics

Create an Activity in Outlook 460
Create a Record in Outlook 460
Managing E-mail Activities 184
Requesting User Interface Changes 220
Set Personal Options....201

Create a new activity

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

Outlook sets reminders for task and appointment activities, but not for other Microsoft Dynamics CRM activity types.

1. Start Outlook. (Microsoft Dynamics CRM for Outlook must be installed.)
2. In the Navigation Pane, open the organization.
3. Under **Workplace**, expand **My Work**, and then click **Activities**.
4. If you have Outlook 2007 installed, on the **CRM** toolbar, click **New Activity**, and then click the type of activity that you want to create.

   - OR -

   If you have Outlook 2010 installed, click the **Activities** tab, and then in the **New** group, click the type of activity that you want to create.
5. Enter the information that you want. You must enter any required information. In addition, at a minimum, entering information in the following boxes is useful when you or others in your organization refer to the activity later.

   - **Subject**

     You can quickly sort on the subject when you view activities.

   - **Owner**

     Microsoft Dynamics CRM automatically fills this box with your name. You can locate and select another owner. The activity appears in their Activity area.

   - **Duration**

     If this activity is related to a case, make sure that you record the time you spend on the activity in this box. If the case is linked to a contract line, the durations of all the activities for this case are tallied

and updated automatically in the related active contract. The total, which includes the totals from any other cases relating to that contract, can be adjusted manually before billing the customer.

- **Due**

  Enter the date and time that the activity is expected to take place or be completed. You can quickly sort on the **Due** field when you view activities.

6. Click **Save** or **Save and Close**.

Notes

If the duration of an activity is more than 60 minutes (an hour), the value you enter is converted into hours. For example, 70 minutes is converted into 1.17 hours. When the activity is saved, the value is rounded up and might change from the entry that was originally displayed when it was converted from minutes into hours. Note that rounding is only observed on the hundredth of an hour. The exact value for the duration, however, is stored in the database in minutes, and this value is used to calculate the total billing time when resolving cases.

To edit an activity, open the activity, and then make the changes that you want.

Related Topics

Create an Activity in Outlook 460
Save Outlook Contacts, Tasks, and E-mail Messages as Microsoft Dynamics CRM Records 465
Create a Record in Outlook 460
Service Calendar 427

Create and send e-mail activities

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: E-mail Permissions

You can create and send e-mail activities in Microsoft Dynamics CRM from the **Activities** area. E-mail messages that are sent from Microsoft Dynamics CRM do not appear in the Microsoft Dynamics CRM mail folders in Outlook, unless synchronization is set up.

1. Start Microsoft Dynamics CRM.
2. In the Navigation Pane, click **Workplace**, and then click **Activities**.
3. On the **Activities** tab, in the **New** group, click **E-mail**.
4. On the **E-mail** tab, enter the following information:

   - **From**

     Locate and select the sender's name.

   - **To**

Locate and select one or more recipients. You can click the **Lookup** button to search for and select records.

- **Subject**

  Type a subject for your e-mail message.

- **Duration**

  This field is not required, but if you are tracking the amount of time spent on cases, and this message is related to a case, enter the amount of time spent on this message.

- **Due**

  If you are not sending your e-mail message immediately, enter a date to complete and send the message. The message is not sent automatically.

Tip

- You can copy and paste content from Microsoft Office Word. This lets you take advantage of features such as spelling check and some text formatting. If your text is double-spaced, you can press SHIFT+ENTER to single-space lines of text.
- You can include an image if the file is hosted on a public Web site. Use the copy and paste feature of Microsoft Internet Explorer to include a link to the image in the message. The image is displayed as long as the receipient has access to the Web site.

You can also attach an article, template, or file to an e-mail activity.

To attach an article

a. To look up and select an article, on the Formatting toolbar, click **Insert Article**.

b. Use the **Search** tab to specify conditions or criteria to locate the article.

c. In the results list, select the article, and then click **OK**.

   The article appears the body of in your e-mail message.

d. Type any additional text, or edit the article.

To attach an e-mail template

a. To look up and select an e-mail template, click **Insert Template**.

b. On the **Insert Template** dialog box, select the template you want to use. You can either use a global template, or a template specific to the record type you selected as the recipient. For example, account or customer.

c. Click **OK**.

   The template appears in the body of your e-mail message and the subject line is updated with the subject line of the template.

d. Type any additional text or edit the text provided. Editing the text or subject line in the message does not change the template.

To attach a file

a. Save the activity.

b. On the **Attachments** tab, click **New E-mail Attachment**.

c. In the **Add Attachment** dialog box, in the **File Name** box, type the name of the file, or click **Browse** to locate the file that you want to attach.

d. Click **Attach**.

5. To send the message immediately, click **Send**.

   The message is sent and the new closed activity appears in Microsoft Dynamics CRM in the **Activities** area with an assigned message number appended to the subject. It also appears in Outlook in the Sent Items folder.

   - OR -

   To send the message at a later time, click **Save and Close**. The new draft activity appears in Microsoft Dynamics CRM in the **Activities** area. You can delete draft messages.

Important

After you save your e-mail message as a Microsoft Dynamics CRM e-mail activity, the saved message can be accessed by anyone who has access to your activities in Microsoft Dynamics CRM.

Notes

- You can view the sent date of an e-mail message on the **Activities** list. The **Actual End Date** is the date the message was sent and closed.
- You can forward or reply to an e-mail activity, but you cannot resend it.

To reply to only the original sender, open the e-mail message. In the **Respond** group, click **Reply**.

To reply to the original sender and to send copies to everyone who originally received the message, click **Reply All**.

To forward the e-mail activity to new recipients, click **Forward**, and then select new recipients.

- There is no spell check built into Microsoft Dynamics CRM. There might be third-party solutions available. For more information, visit *Microsoft Dynamics CRM Solution Finder* (see Microsoft Dynamics CRM Solution Finder - *http://go.microsoft.com/fwlink/?LinkId=98752*).

Related Topics

Work with E-mail Activities 187
Create an Activity in Outlook 460
Manage Activities 23
Send Direct E-mail to Customers 171
Save Outlook Contacts, Tasks, and E-mail Messages as Microsoft Dynamics CRM Records 465
Sending and Receiving E-mail in Microsoft Dynamics CRM for Outlook 185
Work with E-mail Templates 187
Managing E-mail Activities 184

Create an e-mail message in Outlook

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: E-mail Permissions

You can create e-mail messages in Microsoft Office Outlook by using either the Microsoft Dynamics CRM forms or the Outlook forms. By default, an e-mail message that has been marked for tracking is synchronized in Microsoft Dynamics CRM for Outlook and Microsoft Dynamics CRM, and when you reply to or forward an e-mail message from it, the Outlook form opens.

1. Start Outlook. (Microsoft Dynamics CRM for Outlook must be installed.)
2. Do one of the following:

   Create an e-mail message in an Outlook form

   a. On the Microsoft Office Outlook Standard toolbar, click **New**.

   b. In the **New** menu, click **Mail Message**.

   c. In the Outlook form, you can use either your Outlook contacts or your Microsoft Dynamics CRM contacts. For more information, see Microsoft Office Outlook Help.

   d. On the Microsoft Dynamics CRM toolbar, click **Track in CRM**.

      After you send the message, the **View in CRM** button becomes available.

   e. Do one of the following to locate and select a parent record to link to this record:

      - In Microsoft Office Outlook 2003, click **Regarding**.
      - In Microsoft Office Outlook 2007, click **Set Parent** or **Set Regarding**.

   f. On the **Outlook** toolbar, click **Send**.

      The e-mail message appears in your Microsoft Dynamics CRM folders. The icon changes to the **Track in CRM** button . The sent e-mail activity is saved as a Microsoft Dynamics CRM e-mail activity and appears in the Microsoft Dynamics CRM Activities area.

      An e-mail activity is not created until the message is sent.

   To view the contact record, on the Microsoft Dynamics CRM toolbar click, **View in CRM**.

   Create an e-mail message in a Microsoft Dynamics CRM form

   This procedure does not create an Outlook e-mail message. These e-mail messages only appear in the Microsoft Dynamics CRM for Outlook folders and do not appear the Outlook **Sent Items** folder.

   You can edit a draft e-mail message by following steps 1 through 2 to navigate to the Activities area in Microsoft Dynamics CRM for Outlook. Then, open the record you want to edit.

   a. In the Outlook Navigation Pane, click the button for your organization, and then expand **Workplace**.

   b. Under **Workplace**, expand **My Work**, and then click **Activities**.

c. In the Activities area, on the **Actions** menu, click **New**.

d. In the **New Activity** dialog box, click **E-mail**, and then click **OK**.

e. On the **E-mail** tab, enter the following information:

- **From**

  Locate and select the sender's name.

- **To**

  Locate and select one or more recipients. You can click the **Lookup** button to search for and select records.

- **Subject**

  Type a subject for your e-mail message.

- **Duration**

  This field is not required, but if you are tracking the amount of time spent on cases, and this message is related to a case, enter the amount of time spent on this message.

- **Due**

  If you are not sending your e-mail message immediately, enter a date to complete and send the message. The message is not sent automatically.

Tip

- You can copy and paste content from Microsoft Office Word. This lets you take advantage of features such as spelling check and some text formatting. If your text is double-spaced, you can press SHIFT+ENTER to single-space lines of text.
- You can include an image if the file is hosted on a public Web site. Use the copy and paste feature of Microsoft Internet Explorer to include a link to the image in the message. The image is displayed as long as the receipient has access to the Web site.

You can also attach an article, template, or file to an e-mail activity.

To attach an article

1. To look up and select an article, on the Formatting toolbar, click **Insert Article**.
2. Use the **Search** tab to specify conditions or criteria to locate the article.
3. In the results list, select the article, and then click **OK**.
4. The article appears the body of in your e-mail message.
5. Type any additional text, or edit the article.

To attach an e-mail template

1. To look up and select an e-mail template, click **Insert Template**.
2. On the **Insert Template** dialog box, select the template you want to use. You can either use a global template, or a template specific to the record type you selected as the recipient. For example, account or customer.

3. Click **OK**.

   The template appears in the body of your e-mail message and the subject line is updated with the subject line of the template.

4. Type any additional text or edit the text provided. Editing the text or subject line in the message does not change the template.

To attach a file

1. Save the activity.
2. On the **Attachments** tab, click **New E-mail Attachment**.
3. In the **Add Attachment** dialog box, in the **File Name** box, type the name of the file, or click **Browse** to locate the file that you want to attach.
4. Click **Attach**.

f. To send the message immediately, click **Send**.

The message is sent and the new closed activity appears in Microsoft Dynamics CRM in the **Activities** area with an assigned message number appended to the subject. It also appears in Outlook in the Sent Items folder.

- OR -

To send the message at a later time, click **Save and Close**. The new draft activity appears in Microsoft Dynamics CRM in the **Activities** area. You can delete draft messages.

Important: If you are working offline, e-mail messages will not be sent until you go back online. The status will still be **Closed**. You can view a list of unsent e-mail from the Activities list, with the **My Pending E-mails** view.

Important

After you save your e-mail message as a Microsoft Dynamics CRM e-mail activity, the saved message can be accessed by anyone who has access to your activities in Microsoft Dynamics CRM.

Notes

- After a message is sent, the status is changed to **Closed** and displayed in Microsoft Dynamics CRM in the **Activities** pane. You cannot change the status or edit the message, except to link a record in the **Regarding** box, if one has not been selected.
- You can forward or reply to an e-mail activity, but you cannot resend it.

To reply to only the original sender, open the e-mail message. In the **Respond** group, click **Reply**.

To reply to the original sender and to send copies to everyone who originally received the message, click **Reply All**.

To forward the e-mail activity to new recipients, click **Forward**, and then select new recipients.

Related Topics

Work with E-mail Activities 187
Create an Activity in Outlook 460
Save Outlook Contacts, Tasks, and E-mail Messages as Microsoft Dynamics CRM Records 465
Sending and Receiving E-mail in Microsoft Dynamics CRM for Outlook 185
Managing E-mail Activities 184
Requesting User Interface Changes 220

Save Outlook Contacts, Tasks, and E-mail Messages as Microsoft Dynamics CRM Records

By using Microsoft Dynamics CRM for Outlook, you can save individual Outlook contacts, appointments, e-mail messages, and tasks as Microsoft Dynamics CRM records and activities and then link them to a related Microsoft Dynamics CRM record, such as a contact, account, or lead. Activities appear in the related record's list of activities.

You can also set options to determine how incoming e-mail is handled.

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

You can save Outlook contacts as new Microsoft Dynamics CRM contacts. You can link the newly saved record to another Microsoft Dynamics CRM record, such as an account or contact.

1. Start Outlook. (Microsoft Dynamics CRM for Outlook must be installed.)
2. In the Outlook contacts folder, select up to 20 contacts.
3. If you have Outlook 2007 installed, on the **CRM Toolbar**, click **Track in CRM**.

   - OR -

   If you have Outlook 2010 installed, in the **CRM** group, click **Track**.

   In the Outlook Contacts folder, if the contacts are displayed in a list, the **Tracked in CRM** icon is displayed and indicates that the contact is tracked.

   The contacts appear in the **Contacts** area in Microsoft Dynamics CRM.
4. To link the contacts to a parent record, in Outlook, in the **CRM** group, click **Set Parent**. Click the type of record. In the **Look Up Record** dialog box, click the record that you want, and then click **OK**.

   Tip
   Click **Regarding**, **Set Regarding**, or **Set Parent** first, and **Track in CRM** is automatically activated.

Notes

- Duplicate detection identifies duplicate records when a record is tracked. Microsoft Dynamics CRM also checks for duplicates when you synchronize or go back online.

Resolve potential duplicate records.

If the system detects that your record might be a potential duplicate, instead of saving the record, Microsoft Dynamics CRM displays the **Duplicates Detected** dialog box.

1. To open a record to make sure it is a potential duplicate, in the **Potential duplicate records** list, double-click the record.
   - If the duplicate-detection rule identified potential duplicate records in other record types, review records from each record type listed.
2. If your new or updated record is not a duplicate, to create the new record, click **Save Record**.

   - OR -

   If your new or updated record is a duplicate, to cancel your changes, click **Cancel**.

Notes

- If you enter a duplicate record within a few minutes of entering the first record, Microsoft Dynamics CRM will not detect the duplicate record. The matchcodes for new and updated records are created every five minutes, rather than as a record is created.
- Duplicate detection can take place only if duplicate detection is enabled in **Duplicate Detection Settings** and if at least one duplicate-detection rule exists for the record type. More information: *Avoiding Duplicate Records* (on page 69)
  - To add additional information to the **Contact** form in Microsoft Dynamics CRM, click the contact in Outlook and then, in the **CRM** group, click **View in CRM**.
  - If the contact is linked to a parent record, you can open the parent record from the Outlook contact record. In the Outlook contacts list, click or open the record. In the **CRM** group, click **View Parent**.
  - The **Company** field in an Outlook contact is not automatically added to the parent account of the new Microsoft Dynamics CRM contact. More information: *Set Personal Options* (on page 201)

Related Topics

Create a Record in Outlook 460
Save Outlook Contacts, Tasks, and E-mail Messages as Microsoft Dynamics CRM Records 465
Sending and Receiving E-mail in Microsoft Dynamics CRM for Outlook 185
Work with E-mail Templates 187
Managing E-mail Activities 184

Save and link Outlook tasks and appointments in Microsoft Dynamics CRM

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

You can save an Outlook unassigned task, nonrecurring appointment, and meeting request as a new Microsoft Dynamics CRM activity record by tracking the item. You can also link the Outlook item to a Microsoft Dynamics CRM record, such as an account or contact. When you track an item, it also creates a new Microsoft Dynamics CRM record that is linked to the Outlook record. Updates to the item in either Outlook or Microsoft Dynamics CRM are reflected in both records.

1. Start Outlook. (Microsoft Dynamics CRM for Outlook must be installed.)
2. In the Outlook calendar or task list, select one or more appointments, meeting requests, or tasks that you want to add to Microsoft Dynamics CRM. You can select up to 20 records of the same record type at a time.
3. Save Outlook calendar items and tasks as Microsoft Dynamics CRM activities
   - On the Microsoft Dynamics CRM toolbar, click **Track in CRM**.

     In the Outlook tasks folder, the icons beside the records change to the **Tracked in CRM** icon . Tasks appear as activities in the Activities area of Microsoft Dynamics CRM.
4. Save Outlook tasks as Microsoft Dynamics CRM phone calls, faxes, or letters
   - In the Outlook tasks folder, select up to 20 tasks.
   - On the Microsoft Dynamics CRM toolbar, point to **Track in CRM**, and then click the type of Microsoft Dynamics CRM activity you want to create.

     In the Outlook tasks folder, the icons beside the records change to the **Tracked in CRM** icon . New tasks appear as the selected activities in the Activities area in Microsoft Dynamics CRM.
5. To add information in the new Microsoft Dynamics CRM activity form, open the item in Outlook, and then, in the **CRM** group, click **View in CRM**.

   The Microsoft Dynamics CRM record opens.

   You cannot edit an activity after it has been closed in Microsoft Dynamics CRM. The exception is sent e-mail messages, which you can update with information about the record to which the e-mail message relates.
6. To link the item to a Microsoft Dynamics CRM record, such as an account or contact, open the item, and then in the **CRM** group, click **Set Regarding**. Click the record type that you want, click the record, and then click **OK**.

   Tip
   Click **Regarding**, **Set Regarding**, or **Set Parent** first, and **Track in CRM** is automatically activated.

Notes

- In Outlook, you can remove the link and delete the corresponding record in Microsoft Dynamics CRM. Open the Outlook item. In the **CRM** group, click **Untrack**, and then in the confirmation message, click **Yes**.
- In Outlook, Microsoft Dynamics CRM includes links to the regarding and parent record, and also lists how the item is tracked.
- Duplicate detection identifies duplicate records when a record is tracked. Microsoft Dynamics CRM also checks for duplicates when you synchronize or go back online.

Resolve potential duplicate records.

If the system detects that your record might be a potential duplicate, instead of saving the record, Microsoft Dynamics CRM displays the **Duplicates Detected** dialog box.

1. To open a record to make sure it is a potential duplicate, in the **Potential duplicate records** list, double-click the record.
   - If the duplicate-detection rule identified potential duplicate records in other record types, review records from each record type listed.
2. If your new or updated record is not a duplicate, to create the new record, click **Save Record**.

   - OR -

   If your new or updated record is a duplicate, to cancel your changes, click **Cancel**.

Notes

- If you enter a duplicate record within a few minutes of entering the first record, Microsoft Dynamics CRM will not detect the duplicate record. The matchcodes for new and updated records are created every five minutes, rather than as a record is created.
- Duplicate detection can take place only if duplicate detection is enabled in **Duplicate Detection Settings** and if at least one duplicate-detection rule exists for the record type. More information: *Avoiding Duplicate Records* (on page 69)
- If you are not selected as one of the required resources in an appointment or service activity, the activity will not appear in your Outlook calendar after synchronization.
- A task stored in the Outlook default message store, or locations other than the default Microsoft Exchange location, cannot be linked.

Related Topics

Save Outlook Contacts, Tasks, and E-mail Messages as Microsoft Dynamics CRM Records 465

Sending and Receiving E-mail in Microsoft Dynamics CRM for Outlook 185

Work with E-mail Templates.....187

Managing E-mail Activities 184

Save and link Outlook e-mail messages as Microsoft Dynamics CRM e-mail activities

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: E-mail Permissions

You can save Outlook e-mail messages as new Microsoft Dynamics CRM e-mail activities. You can also set the **Regarding** field for any e-mail activity.

Your administrator can block messages from being saved if they contain attachments of specific file types, such as .exe files. Any messages that are stored in locations other than the default Microsoft Exchange location cannot be linked. After you save your e-mail message as a Microsoft Dynamics CRM e-mail activity, the saved message can be accessed by anyone who has access to your activities in Microsoft Dynamics CRM.

1. Start Outlook. (Microsoft Dynamics CRM for Outlook must be installed.)
2. In an Outlook folder, select the e-mail messages that you want to add to Microsoft Dynamics CRM. You can select up to 20 records at a time.
3. If you have Outlook 2007 installed, on the **CRM** toolbar, click **Track in CRM**.

   If you have Outlook 2010 installed, in the **CRM** group, click **Track**.

   In the Outlook folder, the symbol beside the records changes to the **Tracked in CRM** icon . E-mail messages appear as activities in the **Activities** area of Microsoft Dynamics CRM.
4. To add more information to the Microsoft Dynamics CRM e-mail activity form, open the e-mail message in Outlook, and then, in the **CRM** group, click **View in CRM**. The Microsoft Dynamics CRM record form opens.

   You cannot edit an e-mail message after it has been sent, except to include the record to which the e-mail message relates.
5. To link the e-mail message to a Microsoft Dynamics CRM record, such as an account or contact, click **Set Regarding**.

   Tip
   Click **Regarding**, **Set Regarding**, or **Set Parent** first, and **Track in CRM** is automatically activated.

   Notes
   - You can set whether replies to tracked messages are also tracked. More information: *Set Personal Options* (on page 201)
   - When Microsoft Dynamics CRM for Outlook is installed, e-mail messages, as well as contacts, appointments, and tasks, include a Microsoft Dynamics CRM pane that displays information about the sender and recipients. An icon is displayed that shows the record type of the sender and recipients in Microsoft Dynamics CRM. The pane also includes links to the parent, regarding, and related Microsoft Dynamics CRM records. Click the links to open the records in Microsoft Dynamics CRM. More information: *Tracking Records* (see "*Tracking Records in Outlook*" on page 485)

- In Outlook, you can remove the link and delete the corresponding record in Microsoft Dynamics CRM. Open the Outlook item. In the **CRM** group, click **Untrack**, and then in the confirmation message, click **Yes**.

Related Topics

Save Outlook Contacts, Tasks, and E-mail Messages as Microsoft Dynamics CRM Records 465

Work with E-mail Templates 187

Automatically track and save incoming Outlook e-mail as Microsoft Dynamics CRM e-mail activities

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: E-mail Permissions

When you track e-mail messages, Microsoft Dynamics CRM for Outlook creates e-mail message activity records in Microsoft Dynamics CRM that are linked to the original messages in Microsoft Office Outlook. The e-mail address of the sender must match the e-mail address of a Microsoft Dynamics CRM record.

Important
After you save your e-mail message as a Microsoft Dynamics CRM e-mail activity, the saved message can be accessed by anyone who has access to your activities in Microsoft Dynamics CRM.

1. Start Outlook. (Microsoft Dynamics CRM for Outlook must be installed.)
2. If you have Outlook 2007 installed, on the **CRM** menu, click **Options**.

   - OR -

   If you have Outlook 2010 installed, click **File**. Click the **CRM** tab, and then click **Options**.
3. In the **Set Personal Options** dialog box, click the **E-mail** tab.
4. To automatically link and save incoming e-mail messages as Microsoft Dynamics CRM records, in the **Select how Microsoft Dynamics CRM for Outlook should integrate e-mail with Microsoft Dynamics CRM** section, select the **Check incoming e-mail in Outlook and determine whether an e-mail should be linked and saved as a Microsoft Dynamics CRM record** check box.
5. To select whether you want to track and save all e-mail messages or only certain types, in the **Select the e-mail messages to track in Microsoft Dynamics CRM** section, click one of the following options:
   - **All e-mail messages**
   - **E-mail messages in response to CRM e-mail**. E-mail messages are tracked only if the person has a record in Microsoft Dynamics CRM.

- **E-mail messages from CRM Leads, Contacts, and Accounts**. E-mail messages are tracked only if it comes from someone with a Microsoft Dynamics CRM lead, contact, or account record.
- **E-mail messages from Microsoft Dynamics CRM records that are e-mail enabled**. E-mail messages are tracked from all record types, including custom record types, that contain an e-mail address field.

6. Choose the icon that is displayed for e-mail messages that are tracked in Microsoft Dynamics CRM. **Microsoft Dynamics CRM icon** is selected by default. Or, select **Outlook**.

   If you choose the Microsoft Dynamics CRM icon, tracked items display the icon.

7. Click **OK**.

   Notes

   - You can send e-mail messages from Microsoft Dynamics CRM using Outlook. In the **Select how Microsoft Dynamics CRM for Outlook should integrate e-mail with Microsoft Dynamics CRM** section, select the **Allow Microsoft Dynamics CRM to send e-mail using Microsoft Dynamics CRM for Outlook** check box.
   - When Microsoft Dynamics CRM for Outlook is installed, e-mail messages, as well as contacts, appointments, and tasks, include a Microsoft Dynamics CRM pane that displays information about the sender and recipients. An icon is displayed that shows the record type of the sender and recipients in Microsoft Dynamics CRM. The pane also includes links to the parent, regarding, and related Microsoft Dynamics CRM records. Click the links to open the records in Microsoft Dynamics CRM. More information: *Tracking Records* (see "*Tracking Records in Outlook*" on page 485)
   - You can also open a record that is being tracked in Microsoft Dynamics CRM. In the **CRM** group, click **View in CRM**.
   - More than one custom record type could contain the same e-mail address. When this happens, Microsoft Dynamics CRM links the e-mail messages that are received from this e-mail address to the custom record type that was created first. For example, a Patient record type that was created in January lists the e-mail address someone@example.com. A Doctor record type created in February also lists the same e-mail address. Microsoft Dynamics CRM links the e-mail messages received from someone@example.com only to the Patient record type. Sending an e-mail message to someone@example.com links the e-mail message to the Patient record type and the Doctor record type.

Related Topics

Save Outlook Contacts, Tasks, and E-mail Messages as Microsoft Dynamics CRM Records 465

Synchronizing Information 484

Sending and Receiving E-mail in Microsoft Dynamics CRM for Outlook 185

Automatically create Microsoft Dynamics CRM contact and lead records from e-mail messages and meeting requests

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: E-mail Permissions

If you track an e-mail message or meeting request from someone who does not already have a record in Microsoft Dynamics CRM, Microsoft Dynamics CRM or Microsoft Dynamics CRM for Outlook can automatically create a Microsoft Dynamics CRM contact or lead record using the e-mail address of the sender or meeting organizer. Contact or lead records are also automatically created from e-mail messages if the sender does not have a record in Microsoft Dynamics CRM. The e-mail address of the sender or meeting organizer is compared to the e-mail addresses in Microsoft Dynamics CRM.

> **Important**
> After you save your e-mail message as a Microsoft Dynamics CRM e-mail activity, the saved message can be accessed by anyone who has access to your activities in Microsoft Dynamics CRM.

To automatically create contact or lead records using the Microsoft Dynamics CRM Web application:

1. Click the **File** tab, and then click **Options**.
2. In the **Set Personal Options** dialog box, click the **E-mail** tab.
3. In the **Automatically create records in Microsoft Dynamics CRM** section, select the **Create** check box.
4. Select the type of records to create.

   Contacts is selected by default. If you want Microsoft Dynamics CRM to create lead records, click **Leads**.
5. Click **OK**.

To automatically create contact or lead records using Microsoft Dynamics CRM for Outlook:

1. Start Outlook. (Microsoft Dynamics CRM for Outlook must be installed.)
2. If you have Outlook 2007 installed, on the **CRM** menu, click **Options**.

   - OR -

   If you have Outlook 2010 installed, click **File**. Click the **CRM** tab, and then click **Options**.
3. In the **Set Personal Options** dialog box, click the **E-mail** tab.
4. In the **Automatically create records in Microsoft Dynamics CRM** section, select the **Create** check box.
5. Select the type of records to create.

   Contacts is selected by default. If you want Microsoft Dynamics CRM for Outlook to create lead records click **Leads**.

6. Click **OK**.

   Notes

   - While you are offline when using Microsoft Dynamics CRM for Outlook, contact and lead records are not created automatically from tracked e-mail messages or the organizer of tracked meetings. You must manually create the records.
   - When Microsoft Dynamics CRM for Outlook is installed, e-mail messages, as well as contacts, appointments, and tasks, include a Microsoft Dynamics CRM pane that displays information about the sender and recipients. An icon is displayed that shows the record type of the sender and recipients in Microsoft Dynamics CRM. The pane also includes links to the parent, regarding, and related Microsoft Dynamics CRM records. Click the links to open the records in Microsoft Dynamics CRM. More information: *Tracking Records* (see "*Tracking Records in Outlook*" on page 485)

You can choose whether to use Outlook or Microsoft Dynamics CRM forms when you create activities such as appointments, contacts, tasks, and e-mail messages. By default, Outlook forms are used.

1. If you have Outlook 2007 installed, on the **CRM** menu, click **Options**.

   If you have Outlook 2010 installed, click **File**. Click the **CRM** tab, and then click **Options**.

2. If you want Microsoft Dynamics CRM forms to open for activities, in the **Set Personal Options** dialog box, on the **General** tab, select the check boxes for the activities.

   - OR -

   If you want Outlook forms to open for activities, clear the check boxes for the activities.

Connect to Another Organization in Microsoft Dynamics CRM for Outlook

When you are in Outlook, if you are a member of more than one organization, you can change the Microsoft Dynamics CRM organization while you are online. This feature is not available when you are offline.

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

Note
You must be a member of more than one organization to connect to a different organization. If you need to be added to additional organizations, contact your system administrator.

1. Close Outlook.
2. Click **Start**, point to **All Programs**, click **Microsoft Dynamics CRM 2011**, and then click **Configuration Wizard**.
3. In the Microsoft Dynamics CRM for Outlook Configuration Wizard, click **Add**.
4. In the **Configure Organization** dialog box, in the **Server URL** box, type the URL address for the Microsoft Dynamics CRM server. For example, http://adventure-works.
5. Click **Test Connection**.

6. If necessary, click **Change**, to type your user name and password for the server. Then, click **Test Connection** again.
7. In the **Organization** box, select the name of your organization.

   A display name for organization is shown in the **Display Name** box.
8. If you want, type a different name for your organization.
9. If you want to automatically synchronize e-mail messages, tasks, appointments, and other Microsoft Dynamics CRM activities with the organization, select the **Synchronize with this Organization** check box.

   If you are prompted about whether you want to change your synchronizing or primary organization, click **OK** to change the organization.

   - OR -

   Click **Cancel** to continue to synchronize e-mail messages, tasks, appointments and other Microsoft Dynamics CRM activities with your original organization.

   Note

   You can synchronize information with only one organization. You can connect to or work with more than one organization. If you connect to more than one organization, they are both listed in the Navigation Pane.
10. Click **OK**.
11. In the Microsoft Dynamics CRM for Outlook Configuration Wizard, click **Close**.

Tip

You can manually synchronize information between Outlook and Microsoft Dynamics CRM on your primary computer. For more information about how to manually synchronize information, see Synchronize with Outlook manually.

Related Topics

Doing CRM Work in Outlook 459

Synchronizing Information

While you are online with Microsoft Dynamics CRM for Microsoft Office Outlook, changes you make to tracked records in Outlook or Microsoft Dynamics CRM are visible to others as soon as you save the record. Changes that others make to Microsoft Dynamics CRM are visible to you after they save the record. Changes that others make to records you are tracking in Outlook may not be visible in Outlook for up to 15 minutes.

If you are working offline, your changes are kept in your local data, which was updated last when you went offline. When you go back online, your changes are made to the Microsoft Dynamics CRM server and are visible to everyone.

The Microsoft Dynamics CRM address book is synchronized separately and on a different schedule.

Synchronizing and Tracking Microsoft Dynamics CRM Data with Outlook

You can set your synchronization options so that incoming and outgoing Microsoft Dynamics CRM e-mail messages are recognized as an e-mail activity.

Track e-mail messages, contacts, tasks, meetings and appointments in Outlook to create a corresponding activity or contact record in Microsoft Dynamics CRM. You can link the item to a Microsoft Dynamics CRM record, also.

The process of linking an Outlook item to a Microsoft Dynamics CRM record only requires you to select one or more records, click the **Set Regarding** or **Set Parent** button, and then select an account or contact. Clicking **Set Regarding** or **Set Parent** automatically tracks the record, also.

Link a record at any time, and this also tracks all replies to linked e-mail messages. Tracked e-mail messages, contacts, tasks, and appointments are updated to Microsoft Dynamics CRM immediately while you are online. If you are offline, these items are stored in your local data to be synchronized with the Microsoft Dynamics CRM server when you go back online.

More information: *Save Outlook Contacts, Tasks, and E-mail Messages as Microsoft Dynamics CRM Records* (on page 465)

By default, tracked items display a Microsoft Dynamics CRM symbol rather than the standard Outlook symbols for e-mail messages, contacts, and tasks.

More information: Automatically track and save incoming e-mail as Microsoft Dynamics CRM e-mail activities.

You can choose to automatically create Microsoft Dynamics CRM contact or lead records from the sender of tracked e-mail messages and the organizer of tracked meetings when you are online.

While you are offline, contact and lead records are not created automatically from tracked e-mail messages or the organizer of tracked meetings. You must manually create the records.

More information: Automatically create Microsoft Dynamics CRM contact and lead records from e-mail messages and meeting requests

Tracking Records in Outlook

Tracking e-mail messages, contacts, tasks, and appointments (including recurring appointments), instantly adds the items to Microsoft Dynamics CRM. Updates to the information can be done in both programs and can be accessed in both because the data synchronizes between the programs.

Microsoft Dynamics CRM for Outlook allows you to quickly choose the Outlook items that you want to track or stop tracking. Select one or more items to track. However, only choose a single item when wanting to stop tracking an item.

When you track Outlook items, you can also do the following:

- Select the regarding record for one or several items.
- Set the parent account or contact record for contacts.
- Add or edit connections.

- Convert e-mail messages, appointments, meetings, and tasks into Microsoft Dynamics CRM opportunity, lead, and case records.
- Open the record in Microsoft Dynamics CRM and open the parent and regarding record in Microsoft Dynamics CRM.
- Create new contact or lead records with the automatically create contact or lead records option selected.
- Insert and attach Microsoft Dynamics CRM e-mail templates, articles, and sales literature to e-mail messages.
- Track tasks as Microsoft Dynamics CRM tasks, phone calls, letters, or faxes.

When you track a new e-mail message, Microsoft Dynamics CRM creates a new e-mail activity record. You can link the e-mail message to other Microsoft Dynamics CRM records if you select a record that the e-mail message is regarding.

You can also automatically create new contact or lead records from e-mail messages and meeting requests. The new contact or lead record contains the e-mail address of the sender or meeting organizer, and the e-mail message or meeting request links to the new contact or lead record.

Depending on the e-mail tracking options that you select, some items may be synchronized with Microsoft Dynamics CRM automatically so that you do not have to select the items to track.

You can track e-mail messages to and from distribution lists, also. If you do not expand the distribution list before you track and save the e-mail message, and if the option that automatically creates new records is selected, a new Microsoft Dynamics CRM record is created for the distribution list.

More information: *Set Personal Options* (on page 201)

Working Offline

If you install Microsoft Dynamics CRM for Outlook, you can work offline with the Microsoft Dynamics CRM records that you own. When working offline, you can enter new information and edit existing records and activities.

How to tell if you are offline

You can tell that you are offline if:

- The Windows notification area displays the **CRM working offline** icon .
- The Microsoft Dynamics CRM toolbar displays the **Go Online** button.
- The Microsoft Dynamics CRM menu bar displays the **Go Online** option.

Before you go offline, select a subset of Microsoft Dynamics CRM data to be available on your local computer. Any changes you make to this data when you work offline are saved to the local copy of your data.

These local data groups can be reset every time that you go offline to give you the flexibility to download only the data you need. If you chose to remove large amounts of data from your local copy, this can cause a longer synchronization.

More information: Work with Data to Take Offline

The following list shows the features that are unavailable when you are offline

Not available offline

- Assigning records (except activities and cases)
- Converting quotes to sales orders
- Converting sales orders to invoices
- Managing system administration
- Updating system configuration
- Managing service activities
- Managing services
- Using the Service calendar and Workplace calendar
- Editing articles
- Editing or managing sales literature
- Changing organizations
- Sharing records
- Detecting duplicate records
- Managing system jobs
- Running some diagnostic tests
- Running workflow rules
- Create quick campaign and related activities from a Mail Merge

Limited availability

- Creating or viewing reports (based on local data groups and offline data)
- Running some custom business process automating (plug-ins)

Can be viewed, but cannot be edited offline

- Articles
- Sales literature
- Mail merge templates

Microsoft Dynamics CRM applies all your additions and changes to the Microsoft Dynamics CRM server in the same order that you entered or updated it. If you made a change to a record while you are offline, and another user changes the same record during that time, when you go back online, your change will overwrite change made while you were offline.

The first time you go offline, it can take a significant amount of time to synchronize your local data with the Microsoft Dynamics CRM server. While Microsoft Dynamics CRM for Outlook is synchronizing, Microsoft Dynamics CRM is not available.

Customizing Microsoft Dynamics CRM

Customization Capabilities

Customize Microsoft Dynamics CRM to meet the unique needs of your business. This includes creating new functionality, or changing your user interface and navigation. Perform many of the most common customization tasks using tools included in CRM without needing a developer to write code.

If your requirements involve more complex interaction with other applications, Microsoft Dynamics CRM provides a well-documented set of Web services and application configurations. These help developers and Independent Software Vendors (ISVs) create the solutions you need. More information: *Microsoft Dynamics CRM SDK* http://go.microsoft.com/fwlink/?LinkId=191610

To do customizations that affect the full Microsoft Dynamics CRM organization, you must have the System Administrator or System Customizer security role, or equivalent privileges.

Customizations can be grouped into the following areas:

Customization	**More information:**
Create custom entities, or customize existing business entities, to structure and manage your data.	*Customizing Entities* (see "*Understanding Entities*" on page 517), *Understanding Activity Entities* (on page 517)
Create or modify entity relationships so related records have lookup fields to let people link them to other records.	*Understanding Hierarchical Entity Relationships* (on page 592), *Understanding Entity Relationships* (see "*Entity Relationships*" on page 592)
Create or modify fields to capture specific types of data.	*Understanding Entity Fields* (on page 538), *Mapping Entity Fields* (on page 538)
Create or modify entity forms to see or input relevant data to the entity. You can specify which users or teams see a specific form by assigning security roles to them.	*Understanding Entity Forms* (on page 560)
Create or modify entity views to help people easily apply specific data filters to a group of entity records.	Work with Views
Use any of the three client extension features in Microsoft Dynamics CRM for customization tasks: SiteMap, ISV.Config, and IFrames. These features allow the integration of other applications, usually Web sites, into Microsoft Dynamics CRM.	*Add new or existing components to an unmanaged solution* (see "*Add new or existing solution components*" on page 504)
Create new reports or modify existing Microsoft Dynamics CRM reports to customize the way you capture, store, and view data.	*Customizing and Organizing Reports* (on page 95)

Install a solution to extend the functionality of Microsoft Dynamics CRM, and customize components in the solution.

Understanding Solutions (on page 499)

Find the Microsoft Dynamics CRM SDK

The *Microsoft Dynamics CRM SDK http://go.microsoft.com/fwlink/?LinkID=193052* has code samples to help you build powerful vertical applications using the Microsoft Dynamics CRM platform.

Customization Permissions

Permissions required for customization tasks

Customization tasks generally require the default System Administrator or System Customizer security roles. Some other default security roles also provide privileges to perform certain customization tasks or provide access to certain customizations. The following table shows the privileges necessary to perform each task or to have access to certain customizations. Customization tasks are never performed while using Microsoft Dynamics CRM for Outlook offline.

Customization Tasks	**Default Security Roles and Required Privileges**	**Comments**
Access customization area	Security roles: System Administrator System Customizer CEO-Business Manager Customer Service Manager Marketing Professional Marketing Manager Vice President of Marketing Sales Manager Vice President of Sales Privilege: Entity: Read	The Entity Read privilege controls access to the customization area.
Publish customizations	Security roles: System Administrator System Customizer	Customizations that change the schema must be published. The Publish Customizations privilege is separate from other customization privileges because it allows user-interface elements to be customized by

Customization Tasks	**Default Security Roles and Required Privileges**	**Comments**
	Privilege: Publish Customizations	several people but published only by someone who has reviewed the customizations.
Customize entities	Security roles: System Administrator System Customizer Privileges: Entity: Read Entity: Write	These privileges allow you to change the Display Name of the entity. Modification of the entity attributes, form, views, or messages require additional privileges. Editing entity messages requires the privilege: Form: Organization Write.
Create custom entities	Security roles: System Administrator System Customizer Privileges: Entity: Read Entity: Create Entity: Write	These privileges allow you to create a custom entity. Modification of the entity attributes, form, views, or messages require additional privileges.
Set privileges for custom entities	Example Privileges <Custom Entity>: Create <Custom Entity>: Read <Custom Entity>: Write <Custom Entity>: Delete <Custom Entity>: Append <Custom Entity>: Append To <Custom Entity>: Assign <Custom Entity>: Share Security roles: System Administrator System Customizer	When a custom entity is created, the access level is set to None for all privileges in all security roles other than System Administrator and System Customizer. Change the access level as appropriate to enable other users to use custom entities. The settings shown here are default privileges for core user-owned entities that store customer data. These settings represent a common pattern for user-owned entities. Organization-owned custom entities do not have the Assign or Share privilege.
Export customizations	Security roles: System Administrator System Customizer	You are able to export only customizations and settings for which you have read privileges. To export ISV.Config you must have the ISV Extensions privilege.

Customization Tasks	**Default Security Roles and Required Privileges**	**Comments**
	Privilege: Export Customizations	
Import customizations	Security roles: System Administrator System Customizer Privilege: Import Customizations	Some customizations must be published after they are imported before they are available to users. You are able to import only customizations and settings for which you have read, create, and write privileges. Only the System Administrator can import security role definitions or organizational settings.
Customize and publish during import	Security roles: System Administrator System Customizer Privileges: Attribute: Create Attribute: Read Attribute: Write Entity: Read Entity: Write Relationship: Read Relationship: Write Customization: Read Customization: Write Query: Read Query: Write Publish Customizations	
Modify entity attributes	Security roles: System Administrator System Customizer Privileges: Entity: Read Attribute: Read Attribute: Write	These privileges allow for modification of existing entity attributes only. Creation of new attributes requires additional privileges.
Create entity attributes	Security roles:	New entity attributes are not visible to users until they

Customization Tasks	**Default Security Roles and Required Privileges**	**Comments**
	System Administrator System Customizer Privileges: Entity: Read Attribute: Read Attribute: Write Attribute: Create	have been added to the entity form. Modifying the entity form requires the Form: Write privilege.
Edit entity relationships	Security roles: System Administrator System Customizer Privileges: Entity: Read Relationship: Read Relationship: Write	These privileges allow for modification of existing entity relationships only. This includes the ability to create new mappings. Creation of new entity relationships requires additional privileges.
Create entity relationships	Security roles: System Administrator System Customizer Privileges: Entity: Read Relationship: Read Relationship: Write Relationship: Create	New entity relationships cannot be used until the relationship attribute is added to the related entity form. Modifying the entity form requires the Form: Write privilege.
Use custom entity relationships	Security roles: Depends on the entities participating in the relationship. Privileges: primary entity record: Read primary entity record: Append related entity record: Read	At a minimum, users must have User level access to the records participating in the relationship. Users with the Create privilege on the related entity record will be able to create new associated records from the primary entity.

Customization Tasks	**Default Security Roles and Required Privileges**	**Comments**
	related entity record: Write related entity record: Append To related entity record: Create	
Create charts	Security roles: System Administrator System Customizer CEO-Business Manager Customer Service Manager Marketing Professional Marketing Manager Vice President of Marketing Sales Manager Vice President of Sales Privileges: Entity: Read View: Write View: Create View: AppendTo	The Append To privilege on the system view is not exposed in the role editor but is automatically granted to new roles created through Microsoft Dynamics CRM.

Customization Tasks	**Default Security Roles and Required Privileges**	**Comments**
Edit charts	Security roles: System Administrator System Customizer CEO-Business Manager Customer Service Manager Marketing Professional Marketing Manager Vice President of Marketing Sales Manager Vice President of Sales Privileges: Entity: Read View: Write View: Create	
Delete charts	Security roles: System Administrator System Customizer CEO-Business Manager Customer Service Manager Marketing Professional Marketing Manager Vice President of Marketing Sales Manager Vice President of Sales Privileges: Entity: Read View: Write View: Create View: AppendTo	

Customization Tasks	**Default Security Roles and Required Privileges**	**Comments**
Modify entity forms	Security roles: System Administrator System Customizer Privileges: Entity: Read Form: Write	Form: Read privilege is set to Organization and cannot be changed.
Modify system views	Security roles: System Administrator System Customizer CEO-Business Manager Customer Service Manager Marketing Professional Marketing Manager Vice President of Marketing Sales Manager Vice President of Sales Privileges: Entity: Read View: Write	These privileges allow for modification of existing views only. Creation of new views requires additional privileges. The View: Read privilege is set to Organization and cannot be changed.
Create system views	Security roles: System Administrator System Customizer CEO-Business Manager Customer Service Manager Marketing Professional Marketing Manager Vice President of Marketing Sales Manager Vice President of Sales Privileges:	The View: Read privilege is set to Organization and cannot be changed.

Customization Tasks	**Default Security Roles and Required Privileges**	**Comments**
	Entity: Read View: Write View: Create	
Delete system views	Security roles: System Administrator System Customizer CEO-Business Manager Customer Service Manager Marketing Manager Vice President of Marketing Sales Manager Vice President of Sales Privileges: Entity: Read View: Delete	The View: Read privilege is set to Organization and cannot be changed.
View client extensions	Security roles: System Administrator System Customizer CEO-Business Manager Customer Service Manager Marketing Manager Vice President of Marketing Sales Manager Vice President of Sales Privilege: ISV Extensions	This privilege grants users the ability to see client extensions configured using ISV.Config.
Edit entity messages	Security roles: System Administrator System Customizer Privileges: Entity: Read	

Customization Tasks	Default Security Roles and Required Privileges	Comments
	Entity: Write Form: Write	
Download Web Services Description Language files	Security roles: System Administrator System Customizer Privilege: Entity: Read	The entity Read privilege is necessary only to gain access to the URLs in the customization area. It is not necessary to download the Web Services Description Language files.

Related Topics

Customization Permissions 490
Customization Capabilities 489
Check Your Permissions for a Record 50

View Your User Profile

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

Your user profile displays information about you, including general information such as your contact information and addresses, what teams and resource groups you belong to, which services you can perform, and your work hours and security roles. This information is visible to the entire organization. Depending on your security role, you may be able to make changes to your user profile.

If you are working in Microsoft Dynamics CRM for Outlook, you can view this information from the User form. More information: Work with Your User Record and Work Hours

1. Click the **File** tab, and then click **Options**.
2. In the **Set Personal Options** dialog box, click the **General** tab.
3. At the bottom of the page, click the **View your user information** link.

   The User form with your information opens.
4. To view details or make changes, under **Common** or **Service** click any of the following:
   - Teams
   - Roles
   - Quotas

- Work Hours
- Services
- Resource groups
- Workflows

5. To close the form, on the **File** menu, click **Close**.
6. To close the **Set Personal Options** dialog box, click **OK**.

Related Topics

Check Your Permissions for a Record 50
Set Personal Options 201

Publish customizations

Can I do this task?

This task requires the System Administrator or System Customizer security role or equivalent permissions. Customization tasks can be performed only while you are online. More information: *Customization Permissions* (on page 490)

Any time you change user interface elements or implement form scripts for an entity, you must publish changes to apply them. Any customizations that change the data schema of Microsoft Dynamics CRM such as custom entities, relationships, or fields are applied immediately.

To publish customizations for the entity you are currently editing.

- From the **Actions** menu, select **Publish**.

To publish customizations for all entities at once.

1. In the Navigation Pane, click **Settings**, click **Customizations**, and then click **Customize the System**.
2. On the Actions toolbar, select **Actions**, and then click **Publish All Customizations**.

Related Topics

Understanding Entities 517
Import a solution 513

Understanding solutions

Use solutions to extend functionality and the user interface. Customizers and developers distribute their work as solutions. Organizations use Microsoft Dynamics CRM to install and uninstall the solution.

To create a new solution, create a solution record. Then, associate solution components with the solution. Create new solution components in the context of the new solution or add components from existing solutions.

Each solution is associated with a publisher record that contains details about the solution creator. The publisher record includes a customization prefix added to the names of any of the publisher's solution components.

To customize a solution you must have the System Administrator or System Customizer security role, or equivalent privileges.

Related topics

Understanding solution dependencies

Solutions only apply to the native components of Microsoft Dynamics CRM. Each solution has one or more solution components.

Some of the solution components are required components. These are present on the target Microsoft Dynamics CRM system or included with the solution when it is imported. You cannot delete required components.

Create a component in the customization area of Microsoft Dynamics CRM or develop it outside of Microsoft Dynamics CRM. For more information about outside development, see the *Microsoft Dynamics CRM SDK* http://go.microsoft.com/fwlink/?LinkId=191610.

Create a managed solution

Can I do this task?

This task requires the System Administrator or System Customizer security role or equivalent permissions. Customization tasks can be performed only while you are online. More information: *Customization Permissions* (on page 490)

1. In the Navigation Pane, click **Settings**.
2. Under **Customization**, click **Solutions**.
3. On the Actions toolbar, click **New**.
4. Complete the required fields, and click **Save**. By default, this saves an unmanaged solution.
5. To add a new or existing component to your solution, in the **Component Type** list, click the type you want to add. Then, on the Actions toolbar, click **New** or **Add Existing**. More information: *Add new or existing components to an unmanaged solution* (see "*Add new or existing solution components*" on page 504)
6. Click **Save and Close**. Your new unmanaged solution is in the **Solutions** list.

7. Select the solution in the list, and then on the Actions toolbar, click **Export**.
8. Select the options you want in the export wizard. When you get to the **Package Type** page, select **Managed**.
9. Click **Export**.
10. In the **File Download** dialog box, click **Save**, choose a location for the solution .zip or .cab file, and click **Save** again.

    Note
    The regular scenario is for you to create a solution in a text Microsoft Dynamics CRM organization, export it, and then import it into a production Microsoft Dynamics CRM organization. If you want to import your managed solution into the same organization in which you created and exported it, you have to delete the unmanaged version and any components you created. You also have to delete child components such as field relationships that you created. See the following topics for help:

    Delete or remove solution components (on page 506)

    Delete a solution (on page 502)

You now have a managed solution that you can export and then import into another Microsoft Dynamics CRM organization.

See also: *Import a solution* (on page 513)

Can I do this task?

This task requires the System Administrator or System Customizer security role or equivalent permissions. Customization tasks can be performed only while you are online. More information: *Customization Permissions* (on page 490)

This procedure guides you through creating an unmanaged solution.

1. In the Navigation Pane, click **Settings**.
2. Under **Customization**, click **Solutions**.
3. On the Actions toolbar, click **New**.
4. Complete the required fields, and click **Save**. By default, this saves an unmanaged solution.
5. To add a new or existing component to your solution, in the **Component Type** list, click the type you want to add. Then, on the Actions toolbar, click **New** or **Add Existing**. More information: *Add new or existing components to an unmanaged solution* (see "*Add new or existing solution components*" on page 504)
6. Click **Save and Close**. Your new unmanaged solution is in the **Solutions** list.

Edit unmanaged solutions

After you have created and saved an unmanaged solution, you can modify it in several ways:

Add new or existing solution components

Can I do this task?

This task requires the System Administrator or System Customizer security role or equivalent permissions. Customization tasks can be performed only while you are online. More information: *Customization Permissions* (on page 490)

You can add new or existing components to any unmanaged solution. Components can be created in the customization area of Microsoft Dynamics CRM, or can be developed outside of Microsoft Dynamics CRM. For more information about developing solutions, see the *Microsoft Dynamics CRM SDK http://go.microsoft.com/fwlink/?LinkId=191610*.

1. In the Navigation Pane, click **Settings**.
2. Under **Customization**, click **Solutions**.
3. In the **Solutions** list, click to open the unmanaged solution to which you want to add components.
4. In the left pane, click the component type that you want to add. To read the steps for adding each type of component, click the help icon for it.

   You can add new or existing components for most component types. However, for the following types, you can only add components that already exist in Microsoft Dynamics CRM:

   - Client extensions
   - Plug-in assemblies
   - SDK message processing steps
   - Service endpoints
5. To set the managed properties for each component that you are adding, click **Managed Properties**. More information: *Edit managed properties* (see "*Edit or view managed properties*" on page 505)
6. Click **Save and Close** to save your unmanaged solution and any components that you have added to it.
7. When your customizations are complete, publish them:
   - To publish customizations for only the component that you are currently editing, on the **Home** tab, in the **Save** group, click **Publish**.
   - To publish customizations for all unpublished components at one time, click **Publish All Customizations**.

Edit or view managed properties

All solution components, except for plug-in assemblies, have a **Can be customized** managed property. Any managed property only becomes effective after you install the solution as managed.

For components that are part of a managed solution, you cannot edit the **Can be customized** managed property.

If a component is part of the default solution or an unmanaged solution, and it is a custom component, you can edit the **Can be customized** managed property.

An entity has extra managed properties, and behaves as follows:

- If the entity is part of a managed solution, and **Can be customized** is set to **False**, you cannot edit any of the managed properties.
- If the entity is part of a managed solution, and **Can be customized** is set to **True**, you can edit the managed properties.
- If the entity is part of the default solution or an unmanaged solution, and it is a business entity, you can edit all managed properties except for **Can be customized**.
- If the entity is part of the default solution or an unmanaged solution, and it is a custom entity, you can edit all managed properties including **Can be customized**.

➢ Edit or view managed properties

1. In the Navigation Pane, click **Settings**.
2. Under **Customization**, click **Customizations**.
3. In the **Customization** area, click **Customize the System**.
4. Under **Components**, click the component for which you want to edit or view managed properties.
5. On the Actions toolbar, click the **Managed Properties** button.
6. In the **Managed Properties** dialog box, you can edit the property or properties displayed based on the behaviors listed above. You can view all properties that are listed.

Delete or remove solution components

You can delete or remove components from an unmanaged solution, but not from a managed solution. Deleting permanently eliminates the component from Microsoft Dynamics CRM. Removing simply withdraws the component from the solution, although the component is still available for use in Microsoft Dynamics CRM.

You can delete only custom entities and components. Although you cannot delete Microsoft Dynamics CRM business entities, you can remove them from an unmanaged solution that isn't the default solution.

1. In the Navigation Pane, click **Settings**.
2. Under **Customization**, click **Solutions**.
3. In the list of solutions, click the solution that you want to open.
4. In the left pane, click **Components** to see a full list of solution components.
5. To delete a component, select any custom component in the list, and then on Actions toolbar, click **Delete**.

   - OR -

   To remove a component, select any custom component in the list, and then on the Actions toolbar, click **Remove**.

Component dependencies can affect your ability to delete components. More information: Manage solution component dependencies

Delete a solution

The deleting process is the same for a managed solution and an unmanaged solution. When you delete an unmanaged solution, Microsoft Dynamics CRM deletes just the solution record. When you delete a managed solution, Microsoft Dynamics CRM uninstalls all solution components and customizations..

If you attempt to delete a solution, the attempt will fail if you have not first broken dependencies with other components. Before you can delete a custom entity that is a primary entity in a relationship, you must remove the relationship attribute from the related entity form and publish the related entity. More information: Manage solution component dependencies, *Delete solution components* (see "*Delete or remove solution components*" on page 506)

1. In the Navigation Pane, click **Settings**.
2. Under **Customization**, click **Solutions**.
3. In the list of solutions, select the solution, and then on the Actions toolbar, click the **Delete** button .

Add new or existing solution components

Can I do this task?

This task requires the System Administrator or System Customizer security role or equivalent permissions. Customization tasks can be performed only while you are online. More information: *Customization Permissions* (on page 490)

You can add new or existing components to any unmanaged solution. Components can be created in the customization area of Microsoft Dynamics CRM, or can be developed outside of Microsoft Dynamics CRM. For more information about developing solutions, see the *Microsoft Dynamics CRM SDK* http://go.microsoft.com/fwlink/?LinkId=191610.

1. In the Navigation Pane, click **Settings**.
2. Under **Customization**, click **Solutions**.
3. In the **Solutions** list, click to open the unmanaged solution to which you want to add components.
4. In the left pane, click the component type that you want to add. To read the steps for adding each type of component, click the help icon for it.

   You can add new or existing components for most component types. However, for the following types, you can only add components that already exist in Microsoft Dynamics CRM:

   - Client extensions
   - Plug-in assemblies
   - SDK message processing steps
   - Service endpoints

5. To set the managed properties for each component that you are adding, click **Managed Properties**. More information: *Edit managed properties* (see "*Edit or view managed properties*" on page 505)
6. Click **Save and Close** to save your unmanaged solution and any components that you have added to it.
7. When your customizations are complete, publish them:
   - To publish customizations for only the component that you are currently editing, on the **Home** tab, in the **Save** group, click **Publish**.
   - To publish customizations for all unpublished components at one time, click **Publish All Customizations**.

Edit or view managed properties

All solution components, except for plug-in assemblies, have a **Can be customized** managed property. Any managed property only becomes effective after you install the solution as managed.

For components that are part of a managed solution, you cannot edit the **Can be customized** managed property.

If a component is part of the default solution or an unmanaged solution, and it is a custom component, you can edit the **Can be customized** managed property.

An entity has extra managed properties, and behaves as follows:

- If the entity is part of a managed solution, and **Can be customized** is set to **False**, you cannot edit any of the managed properties.
- If the entity is part of a managed solution, and **Can be customized** is set to **True**, you can edit the managed properties.
- If the entity is part of the default solution or an unmanaged solution, and it is a business entity, you can edit all managed properties except for **Can be customized**.
- If the entity is part of the default solution or an unmanaged solution, and it is a custom entity, you can edit all managed properties including **Can be customized**.

➢ Edit or view managed properties

1. In the Navigation Pane, click **Settings**.
2. Under **Customization**, click **Customizations**.
3. In the **Customization** area, click **Customize the System**.
4. Under **Components**, click the component for which you want to edit or view managed properties.
5. On the Actions toolbar, click the **Managed Properties** button.
6. In the **Managed Properties** dialog box, you can edit the property or properties displayed based on the behaviors listed above. You can view all properties that are listed.

Delete or remove solution components

You can delete or remove components from an unmanaged solution, but not from a managed solution. Deleting permanently eliminates the component from Microsoft Dynamics CRM. Removing simply withdraws the component from the solution, although the component is still available for use in Microsoft Dynamics CRM.

You can delete only custom entities and components. Although you cannot delete Microsoft Dynamics CRM business entities, you can remove them from an unmanaged solution that isn't the default solution.

1. In the Navigation Pane, click **Settings**.
2. Under **Customization**, click **Solutions**.
3. In the list of solutions, click the solution that you want to open.
4. In the left pane, click **Components** to see a full list of solution components.
5. To delete a component, select any custom component in the list, and then on Actions toolbar, click **Delete**.

   - OR -

   To remove a component, select any custom component in the list, and then on the Actions toolbar, click **Remove**.

Component dependencies can affect your ability to delete components. More information: Manage solution component dependencies

Solution component dependencies

Solutions often include relationships, lookup fields, and related functionality or user interface changes. These, interacting with other Microsoft Dynamics CRM business or custom components, are dependencies. To delete a solution that has components with dependencies, remove the dependencies first.

Solution component dependencies prevent actions that you normally perform from unintentionally breaking some customization defined in a solution. These dependencies allow a managed solution to be installed and uninstalled only by importing or deleting the solution.

There are two types of solution component dependencies:

- **Published.** To remove this type of dependency, remove the association and then publish the entities again.
- **Internal.** These actions require an action from another solution component. You do not need to manually delete each field or each entity relationship first.

Can I do this task?

This task requires the System Administrator or System Customizer security role or equivalent permissions. Customization tasks can be performed only while you are online. More information: *Customization Permissions* (on page 490)

All components that make up a default solution are listed in the window for that solution. This topic lists any actions you can perform for those components.

1. In the Navigation Pane, click **Settings**.
2. Under **Customization**, click **Customizations**.
3. In the **Customization** area, click **Customize the System**. The default solution opens in a new window.
4. In the Navigation Pane, click **Components** to see a list of all default solution components in the main pane. To see components for an individual type, click a type from the **Component Type** list.

   The component type and the properties set by the creator of the component determines whether a component is customizable. In the table, the Customizable column has *True* for a customizable component.

The following table lists actions that you can perform on some components. These actions are on the toolbar above the table.

Actions	Comments
New	Create a new component. You can create new components for most types. The exceptions are SDK message processing steps, client extensions, plug-in assemblies, and service endpoints.
Delete	Delete an existing component. You can delete unmanaged components or managed components that are customizable. You cannot delete any system entities. If the component has dependencies such as relationships, first you must remove the dependencies before you can delete the component. See **Show Dependencies**.
Publish	This action applies to the entity component. Publish customizations to your Microsoft Dynamics CRM organization, including changes to forms, fields, views, charts, and relationships.
Activate or **Deactivate**	Do this for workflows, dialogues, and SDK message processing step.
Show Dependencies	Open a dialog that lists the other components that are dependent on this component. If you want to delete this component, first you must remove the dependencies.
Managed Properties	This action lists the managed properties settings for the component.

Create an unmanaged solution

Can I do this task?

This task requires the System Administrator or System Customizer security role or equivalent permissions. Customization tasks can be performed only while you are online. More information: *Customization Permissions* (on page 490)

All components that make up an unmanaged solution are listed in the window for that solution. This topic lists any actions you can perform for those components.

To open the window for an unmanaged solution:

1. In the Navigation Pane, click **Settings**.
2. Under **Customization**, click **Solutions**.
3. Double-click the row for the unmanaged solution. The unmanaged solution opens in a new window.
4. In the Navigation Pane, click **Components** to see a list of all solution components in the main pane. To see components for an individual type, click a type from the **Component Type** list.

   The component type and the properties set by the creator of the component determines whether a component is customizable. In the list, the Customizable column has *True* for a customizable component.

The following table lists actions that you can perform on some components. These actions are on the toolbar above the table.

Actions	Comments
New	Create a new component. You can create new components for most types. The exceptions are SDK message processing steps, client extensions, plug-in assemblies, and service endpoints.
Add Existing	Add a component from the default solution or other unmanaged solution to this solution.
Delete	Delete an existing component. You can only delete customizable unmanaged components. You cannot delete any system entities. If the component has dependencies such as relationships, first you must remove the dependencies before you can delete the component. See **Show Dependencies**.
Remove	Remove a component from the solution. The component is available still in the default solution after you remove it from here.
Publish	This applies to the entity component. Publish customizations to your Microsoft Dynamics CRM organization, including changes to forms, fields, views, charts, and relationships.
Activate or **Deactivate**	Do this for workflows, dialogues, and SDK message processing step.
Show Dependencies	Open a dialog that lists the other components that are dependent on this component. If you want to delete this component, first you must remove the dependencies.
Managed Properties	List the managed properties settings for the component.
Add Required Components	Add required components to your solution. This helps you avoid an error when you export the unmanaged solution.

Create a managed solution

Can I do this task?

This task requires the System Administrator or System Customizer security role or equivalent permissions. Customization tasks can be performed only while you are online. More information: *Customization Permissions* (on page 490)

All components that comprise the managed solution are listed in the solution explorer. You can view all components and properties for a managed solution, but you cannot edit the properties or perform any actions on the components.

➢ Open the solution explorer for a managed solution

1. In the Navigation Pane, click **Settings**.
2. Under **Customization**, click **Solutions**.
3. In the table, double-click a managed solution. The **Package Type** column shows if a solution is managed.
4. In the Navigation Pane, click **Components** to see a list of all solution components in the main pane. To see components for an individual type, click the type in the **Component Type** list.

   The component type and the properties set by the creator of the component determines whether a component is customizable. In the table, the Customizable column has *True* for a customizable component.

➢ Modify a customizable component for a managed solution

1. In the Navigation Pane, click **Settings**.
2. Under **Customization**, click **Customizations**.
3. In the **Customization** area, click **Customize the System**.
4. In the Navigation Pane, under **Components**, click the component type that you want to customize.
5. Click the **Help** button in the area for assistance with customizing.

Default solution information

Can I do this task?

This task requires the System Administrator or System Customizer security role or equivalent permissions. Customization tasks can be performed only while you are online. More information: *Customization Permissions* (on page 490)

The Information pane for the Microsoft Dynamics CRM default solution contains property information about the solution. Some of the property fields are editable, as shown in the table.

1. In the Navigation Pane, click **Settings**.
2. Under **Customization**, click **Customizations**.
3. In the **Customization** area, click **Customize the System**. The solution opens in a new window.
4. In the Navigation Pane of the new window, click **Information** to view the solution information.

Fields	Editable?
Display Name: The descriptive name of the solution.	Yes
Name: The unchangeable, unique name set the first time the solution was saved.	No
Publisher: Name of the solution publisher for the default solution.	No
Version: Value saved in Microsoft Dynamics CRM.	No
Configuration Page: Click the **Lookup** button to select a different page to display in the **Configuration** pane.	No
Description: You may add or change the optional description for the solution.	Yes
Installed On: The installation date on for the Microsoft Dynamics CRM organization.	No
Package Type: Shows if the solution is managed or unmanaged. Always displays **Unmanaged**.	No

Managed solution information

Can I do this task?

This task requires the System Administrator or System Customizer security role or equivalent permissions. Customization tasks can be performed only while you are online. More information: *Customization Permissions* (on page 490)

The Information pane for the managed solution contains property information about the solution. Unlike the default solution or an unmanaged solution, none of the properties can be edited.

To view the Information pane for a managed solution:

1. In the Navigation Pane, click **Settings**.
2. Under **Customization**, click **Solutions**.
3. In the table, double-click a managed solution. The **Package Type** column shows if a solution is managed.
4. In the Navigation Pane, click **Information**.

Fields	Editable?
Display Name: Display name assigned to the solution.	No
Name: The unchangeable, unique name set the first time the solution was saved.	No
Publisher: Name of the solution publisher.	No
Version: Set by by the solution creator.	No
Configuration Page: The page displayed in the **Configuration** pane.	No
Description: You may add or change the optional description for the solution.	Yes
Installed On: The installation date for the Microsoft Dynamics CRM organization.	No
Package Type: Shows if the solution is managed or unmanaged. Always displays **Managed**.	No

Unmanaged solution information

Can I do this task?

This task requires the System Administrator or System Customizer security role or equivalent permissions. Customization tasks can be performed only while you are online. More information: *Customization Permissions* (on page 490)

The Information pane for an unmanaged solution contains property information about the solution. The table shows which property fields are editable.

To access the Information pane for an unmanaged solution:

1. In the Navigation Pane, click **Settings**.
2. Under **Customization**, click **Solutions**.
3. In the table, double-click an unmanaged solution. The **Package Type** column shows if a solution is unmanaged.
4. In the Navigation Pane, click **Information**.

Fields	Editable?
Display Name: Name assigned to the solution.	Yes
Name: The unchangeable, unique name set the first time the solution was saved.	No
Publisher: Name of the solution publisher. Click the **Lookup** button to choose a different publisher.	Yes

Version: Initially Microsoft Dynamics CRM sets this value. You can change the version.	Yes
Configuration Page: Click the **Lookup** button to select a different page to display in the **Configuration** pane.	Yes
Description: You may add or change the optional description for the solution.	Yes
Installed On: The installation date for the Microsoft Dynamics CRM organization.	No
Package Type: Shows if the solution is managed or unmanaged. Always displays **Unmanaged**.	No

Exporting customizations

Can I do this task?

This task requires the System Administrator or System Customizer security role or equivalent permissions. Customization tasks can be performed only while you are online. More information: *Customization Permissions* (on page 490)

More information: Exporting Customizations

When deciding which customizations to export, consider how the exported customization file will be used.

- When you import customizations and settings:
  - Any *new* items such as entities, attributes or views will be *added* to the installation.
  - Any changes to *existing* items will *overwrite* the current item.

  These changes can include settings within relationships and event scripts for entities.
- If you plan to transfer customizations from this Microsoft Dynamics CRM implementation to another implementation that also is customized, you will overwrite existing customizations if they are different. To avoid this problem, either:
  - Import all customizations from the target Microsoft Dynamics CRM system prior to performing additional customizations, so that when you export customizations, you'll include existing customizations as well as your new ones.
  - Only export entities that are not already customized in the target Microsoft Dynamics CRM system.

Items available for export

- Custom and customizable entities, including view, forms, fields, relationships, and charts.
- Client extensions.
- Option sets.
- Relationship roles.
- Connection roles.
- Security roles.
- Field-level security profiles.
- Reports.
- Dashboards.

- Templates.
- Workflows and dialogs.
- Plug-in assemblies.
  - System settings.

1. In the Navigation Pane, click **Settings**.
2. Under **Customization**, click **Solutions**.
3. In the list, select the unmanaged solution that you want to export, and then on the Actions toolbar, click **Export**.
4. Only customizations that have been published are exported with the solution. If you have not previously published the customizations, in the **Export Solution** dialog box, click **Publish All Customizations**.
5. Click **Next**.
6. Select the check boxes for the settings that you want to export with the solution.
7. Click **Next**.
8. Read about your options, and then click either **Unmanaged** or **Managed**.
9. Click **Export**.
10. When prompted to open or save the compressed (.zip) file, click **Save**.
11. Choose a location to save your solution, and then click **Save**.

If you want to develop or extend Microsoft Dynamics CRM functionality in the solution, see the *Microsoft Dynamics CRM SDK* http://go.microsoft.com/fwlink/?LinkId=191610 for more information.

Important

- Do not add additional files to a compressed (.zip) file that contains customizations and settings exported from Microsoft Dynamics CRM. Microsoft Dynamics CRM will attempt to import the first file in the compressed (.zip) file. If that is not a valid file the import will fail.
- Some user information may be exported when exporting workflows, for example, the domain logon, the Forms Authentication user name, or the Windows Live unique user identifier (PUID) value.

Related Topics

Understanding Entities 517

Import a solution

Can I do this task?

This task requires the System Administrator or System Customizer security role or equivalent permissions. Customization tasks can be performed only while you are online. More information: *Customization Permissions* (on page 490)

Important

- Only import solutions that you've obtained from a trusted source. Customizations might include code that can send data to external sources.
- When you import customizations or settings that already exist on the target system, the imported customizations will overwrite the existing ones. This situation can happen if you have already customized Microsoft Dynamics CRM, and then add new customizations provided by a third party.

Items available for import

- Custom and customizable entities, including view, forms, fields, relationships, and charts.
- Client extensions.
- Option sets.
- Relationship roles.
- Connection roles.
- Security roles.
- Field-level security profiles.
- Reports.
- Dashboards.
- Templates.
- Workflows and dialogs.
- Plug-in assemblies.
  - System settings.

1. In the Navigation Pane, click **Settings**.
2. Under **Customization**, click **Solutions**.
3. On the Actions toolbar, click **Import**.
4. To browse through folders and locate a compressed (.zip) file or a cabinet (.cab) file that contains customizations and settings exported from Microsoft Dynamics CRM, click **Browse**.

   - OR -

   In the text box next to the Browse button, type the path and file name of a compressed (.zip) file or a cabinet (.cab) file that contains exported customizations and settings.
5. Click **Next**.

   After the file is processed, click **View solution package details** to see a list of the solution components that were imported. If any of the items could not be processed successfully, a dialog box displays error messages.
6. If you are updating an existing solution, the **Import Options** window is displayed. Here, select either **Maintain customization (recommended)** or **Overwrite customizations**. The two options are described in the window.

7. If you want to activate any workflows and enable any SDK message processing steps included in the solution, select the **Post Import Actions** check box. The workflows and SDK message processing steps will begin working as soon as the import is finished.
8. Click **Next**.

   When the solution import is done, a message appears notifying you if it was successful. If any of the items could not be processed successfully, the dialog box displays error messages.
9. If you have imported entity customizations you must publish them before they will be available.
   - To publish customizations for only the component that you are currently editing, on the **Home** tab, in the **Save** group, click **Publish**.
   - To publish customizations for all unpublished components at one time, click **Publish All Customizations**.

   Notes
   - You cannot import a custom entity with the same name as an existing entity. Microsoft Dynamics CRM allows duplicate display names, though.
   - You can import only items that you have organization-level access to create, read, and update.
   - You must have the System Administrator security role to import security roles, organization settings, sdk message processing steps, and plug-in assemblies.
   - If you import customizations that include a language that is not installed on your system, any labels defined in the customizations will default to the base language of the Microsoft Dynamics CRM system the customizations were imported from.
   - All imported security roles will be attached to the root business unit.

If an imported security role originated from the same Microsoft Dynamics CRM system, any changes applied to the security role will be merged. All privileges on system entities for the security role will be replaced by privileges defined by the security role that is being imported.

Related Topics

Understanding Entities 517

Add a solution publisher

Can I do this task?

This task requires the System Administrator or System Customizer security role or equivalent permissions. Customization tasks can be performed only while you are online. More information: *Customization Permissions* (on page 490)

Add information about the publisher of a managed solution or an unmanaged solution. A publisher record already exists for the Microsoft Dynamics CRM default solution.

1. In the Navigation Pane, click **Settings**, click **Customizations**, and then click **Publishers**.
2. On the Actions toolbar, click **New**.

3. Define the **Display Name** for the publisher.

   Note
   The name that you enter here is added as an option to the **Publisher** list in a solution record. When someone creates a new solution, they can select this publisher.

1. In the **Name** box, Microsoft Dynamics CRM creates a name for this entity using the text you entered in the **Display Name** field. You can modify this before saving the entity.
2. In the **Prefix** box, add the text prefix that you want added to any entity or field that you create for a solution that has this publisher. Microsoft Dynamics CRM will add this prefix plus an underscore to the created value in **Name**.
3. In the **Option Value Prefix** box, Microsoft Dynamics CRM generates a set of integers that are the prefix for any option that you create for an option set in a solution that has this publisher.
4. Click **Save and Close**.

Related Topics

Understanding Entities 517
Entity Relationships 592

Edit a solution publisher

Can I do this task?

This task requires the System Administrator or System Customizer security role or equivalent permissions. Customization tasks can be performed only while you are online. More information: *Customization Permissions* (on page 490)

You can edit some of the properties in the publisher record of an unmanaged solution or the Microsoft Dynamics CRM default solution. You cannot edit any properties for a publisher record that was imported as part of a managed solution.

1. In the Navigation Pane, click **Settings**, click **Customizations**, and then click **Publishers**.
2. In the list, double-click the row for the publisher record that you want to edit.
3. Modify the **Display Name** for the publisher. The name that you enter here is added as an option to the **Publisher** list in a solution record. When someone creates a new solution, that person can select this publisher.

   Note
   The value in the **Name** box was created with the record and cannot be edited.

1. In the **Prefix** box, edit the text prefix that you want added to any entity or field created for a solution that has this publisher. This text prefix, plus an underscore, is added before the value in **Name**.
2. In the **Option Value Prefix** text box, edit the set of integers that are a prefix for any option set created in a solution for this publisher.

3. Click **Save and Close**.

Related Topics

Understanding Entities 517
Entity Relationships 592

Understanding Entities

Add custom entities and modify business entities to match your evolving business needs. Make these changes directly from the Microsoft Dynamics CRM user interface. No programming is required.

To customize entities, you must have the System Administrator or System Customizer security role, or have equivalent privileges. More information: *Permissions required for customization* (see "*Permissions required for customization tasks*" on page 490)

Each entity has a number of fields. There are two types of fields:

- **Business fields.** These are any standard Microsoft Dynamics CRM field that can be customized or added to a solution. When part of a solution, business fields might be further customizable, depending on the restrictions placed on them when creating the solution.
- **Custom fields.** These are created in the customization area and can be included in a solution. Custom fields might be customizable further, depending on restrictions placed on them when creating the solution.

More information: Work with Entities

Understanding Microsoft Dynamics CRM Entities

The entities that are part of Microsoft Dynamics CRM by default are called system entities. Many system entities are customizable. You can also create custom entities.

Entity Customization Terminology

Each entity has a number of attributes. When an attribute is added to an entity form, a field is displayed based on the data type stored in the attribute.

There are two types of attributes:

- System attributes include attributes used to manage data, such as Modified_By, and also to provide common fields that can be used to support core features. The use of many of these attributes is optional, but these attributes cannot be deleted. Many of these attributes can be edited by using the entity customization tools.
- Custom attributes let you include custom fields in system or custom entities. These are created and edited by using the entity customization tools. You can delete custom attributes. When you create custom entities, you must create any custom attributes you want to use to store data in the entity.

Activity Entities

Activities are a special type of system entity. Create custom activity entities to support your communication needs, including instant messaging (IM) and text messaging (SMS). More information: *Understanding Activity Entities* (on page 517)

Adding a Custom Entity

If you need to track a category of data that isn't in Microsoft Dynamics CRM by default, you can create a new entity for it. When you create a new entity, default attributes, forms, views, and entity relationships to system entities are created for you. All you need to do is:

- Decide whether the custom entity will have relationships to Notes and Activities.
- Decide whether the custom entity instances should be assigned to a user or available to the entire organization.
- Create the custom entity.
- Select where in the user interface to display the new entity.
- Define new attributes for the custom entity.
- Add the attributes as fields to the forms and views.
- Define any necessary relationships to other entities.
- Define the icons to use for the new entity.
- Publish the custom entity.

More information: Work with Entities

Saving and Publishing Customizations

If you make entity customizations that involve visual changes in the application, you must publish the entity after you save your changes to have the changes take effect.

If you make a change to the Microsoft Dynamics CRM database structure, CRM applies the change immediately. Included with database structure changes are the creation or modification of entities, fields, or relationships.

Importing and Exporting Customizations and Settings

You can export customizations and settings for use on another Microsoft Dynamics CRM system, or to make a backup of your customizations and settings. Exporting customizations and settings can include customizations made to entities as well as settings, templates, and workflows. If you have a valid customization export file, you can import customizations. More information: Export Customizations and Configurations *Import Customizations and Configurations* (see "*Import a solution*" on page 513)

Understanding Activity Entities

Activities are a special type of system entity. Create custom activity entities to support your communication needs, including instant messaging (IM) and text messaging (SMS).

Because customizations affect all users, only a user with the System Administrator or System Customizer security role, or equivalent permissions, can make customizations.

The data is split between two entities:

- **The Activity entity.** The appropriately-named *Activity entity* stores information used in all activity types, such as the owner of the record. You cannot make changes to the Activity entity.
- **Custom activity entities.** You create specific custom activity entities, such as *E-mail*, *Task*, and *Letter*. These store information specific to that type of activity. This information could be the courtesy copy (Cc) addresses used in an e-mail message.

When you create a customized activity entity, it is related automatically to the the Activity entity. When creating a custom activity, specify the entity as an activity entity (not to be confused with *the* Activity entity).

Because you cannot change the Activity entity, you cannot change the Activity entity form. Make your changes to a custom activity entity form.

You can create 1:N (one-to-many) relationships for a custom activity the same as any other activity. Also, you can update existing relationships.

Understanding entity security

You have to have the System Administrator or System Customizer security role to access customization features, which includes most tasks in this topic. The differences in the roles are:

- System Administrator. This role includes privileges to view or modify data in the system.
- System Customizer. This role excludes privileges to view or modify data in the system.

More information: *Permissions required for customization* (see "*Permissions required for customization tasks*" on page 490)

Delete a custom entity

Can I do this task?

This task requires the System Administrator or System Customizer security role or equivalent permissions. Customization tasks can be performed only while you are online. More information: *Customization Permissions* (on page 490)

Notes

- You can only delete custom entities.
- To hide an entity that you are not using, you can change the security roles to remove Read privileges for the entity. This makes it invisible to users.

Caution
Never delete a custom entity that contains data that you want to preserve without first taking steps to export the data so that you can import it again.

Deleting custom entities is done usually when the custom entity is not needed any more or when core elements of the custom entity definition must be changed to meet a requirement. An example of a requirement change would be needing to add entity relationships to an existing **Notes and Activities** or **Activities** entity when those relationships were not specified when creating the custom entity.

1. In the Navigation Pane, click **Settings**.
2. Under **Customization**, click **Customizations**.
3. In the **Customization** area, click **Customize the System**.
4. In the solution explorer, click **Entities**. In the main pane, select the entity you'd like to delete.
5. On the Actions toolbar, click the **Delete** button .
6. Click **OK**.

Important
Deleting a custom entity is irreversible, and results in:

- Loss of all data stored in the entity.
- Deletion of all relationships.
- Deletion of all activities and notes associated with the entity.

Create a new entity

Can I do this task?

This task requires the System Administrator or System Customizer security role or equivalent permissions. Customization tasks can be performed only while you are online. More information: *Customization Permissions* (on page 490)

This procedure guides you through the process of creating an entity. It also guides you through the additional tasks required to make the custom entity useful and accessible to users.

1. In the Navigation Pane, click **Settings**.
2. Under **Customization**, click **Customizations**.
3. In the **Customization** area, click **Customize the System**.
4. Click **Entities**. On the Actions toolbar, click the **New** button.
5. Define the **Display Name** and **Plural Name** that will be used for this entity throughout Microsoft Dynamics CRM.
6. In the **Ownership** list, select either:
   - **User or Team**

Records for this entity can be owned by individual users or by teams. Security can be defined according to the business unit with which the current owner is associated. For example, *contact records* are set to **User or Team**.

- OR -

- **Organization**

  Records for this entity are used for reference by all Microsoft Dynamics CRM users. Individual users or teams cannot own these records. For example, *product records* are set to **Organization**.

7. In the **Name** box, view the name that Microsoft Dynamics CRM will use for this entity. The default entry is created from your entery in **Display Name**. You can modify this before saving the entity.
8. In the **Areas that display this entity** area, select the Navigation Pane areas where you want the entity to appear in the Microsoft Dynamics CRM user interface. All new entities are displayed in Advanced Find.
9. In the **Options for Entity** area, you can select the options listed in this table.

Option	Comments
Note (includes attachments)	Select this to create a relationship with the Note entity, and add a note control to the entity form. This allows users to make annotations for each record.
Activities	Select this to create a relationship with the activity entities, and add an associated view to the entity. This allows you to track activities such as phone calls, e-mails, and tasks. More information: *Understanding Activity Entities* (on page 517)
Connections	Select this to permit ad hoc connections between a record in this entity and records in other entities. More information: *Using Connections to Define How Records Relate* (see "*Using Connect to Define How Records Relate*" on page 44)
Sending e-mail (if an e-mail field does not exist, one will be created)	Select to add the **Send Direct E-mail** button to the main ribbon tab for the entity.
Mail merge	Select this to allow this entity to be used in a mail merge. More information: Mail Merge Documents
Document management	This allows you to track documents on SharePoint that are associated with a record in Microsoft Dynamics CRM. More information: About managing documents in Microsoft Dynamics CRM
Queues	Select this to use this entity in queues. More information: Work with Queues
Duplicate detection	Select this to detect duplicates for this entity. This feature notifies you of identical records in Microsoft Dynamics CRM, and allows you to resolve them. More information: *Avoiding Duplicate Records* (on page 69)

Auditing	Select this to track changes made to your business data. More information: *Auditing data in Microsoft Dynamics CRM* (on page 158, *./Help/ug_audit_about.htm*)
Mobile Express	Select this to display and use this entity in Mobile Express.
Reading pane in CRM for Outlook	Select this to display records in the reading pane in Microsoft Dynamics CRM for Microsoft Office Outlook.
Offline capability for CRM for Outlook	Select this to let users create, read, update, or delete records while offline.

10. Click the **Primary Field** tab. The primary field is displayed when relationships to this entity are created or displayed, such as in the **Look Up Records** dialog box. To make sure an easily recognizable name is used when referencing this entity, enter a descriptive **Display Name**, and leave **Requirement Level** set to **Business Required**.

    Note

    Steps 11 and 12 are optional. You can do them now, or at any time after you have saved and published this new entity.

11. Click **Save**.

    When a new entity is created, the following items are created also:

    - A default public view showing active records and a view showing inactive records.
    - An Advanced Find View, a Quick Find View, an associated view, and a lookup view.
    - The primary attribute you defined and the standard attributes. To see a list of them, navigate to the new entity you created, and under it, click **Fields**. They are displayed in the main pane.
    - For entities that have **Ownership** set to **User or Team**, the creation of the Owner and Owning Business Unit attributes. For entities that have **Ownership** set to **Organization**, the creation of the Organization ID attribute.
    - A filtered view is created in the Microsoft Dynamics CRM database for the entity. This filtered view can be used to write reports using data from this entity.

    Note

    Relationships are created with the User entity to resolve user names for the Created By and Modified By attributes.

12. Change the icon for the new entity.
13. Set entity privileges for security roles. By default, when an entity is created, only the System Administrator and System Customizer security roles have any privileges to read or change data in the custom entity. You must add privileges explicitly to all security roles that need to use the new entity. For any security roles that need to use the new entity, add the needed privileges:

    a. On the Navigation Pane, click **Settings**, click **Administration**, click **Security Roles**, open a security role, and then click the **Custom Entities** tab.

    b. When adding privileges, you can follow the pattern for the privileges that are used on the **Marketing**, **Sales**, or **Service** tabs for the security role to provide users the same level of access to the custom entity that they have to other entities. More information: *Customization Permissions* (on page 490)

14. Publish your customizations:
    - To publish customizations for only the component that you are currently editing, on the **Home** tab, in the **Save** group, click **Publish**.
    - To publish customizations for all unpublished components at one time, click **Publish All Customizations**.

    Important
    Any time you change user interface elements or implement form scripts for an entity, you must publish changes to apply them. Any customizations that change the data schema of Microsoft Dynamics CRM such as custom entities, relationships, or fields are applied immediately.

Rename an entity

Can I do this task?

This task requires the System Administrator or System Customizer security role or equivalent permissions. Customization tasks can be performed only while you are online. More information: *Customization Permissions* (on page 490)

1. In the Navigation Pane, click **Settings**.
2. Under **Customization**, click **Customizations**.
3. In the **Customization** area, click **Customize the System**.
4. Under **Components**, expand **Entities**, and then expand the entity you want.
5. In the main pane, in the **Display Name** and **Plural Name** boxes, enter the new name for the entity.
6. Click **Save**.
7. To achieve better consistency for the entity name change, you should also complete the following:

   Edit the messages the entity displays to users to use the new entity name.

   More information: *Edit Entity Messages* (on page 602)

   Edit the existing reports to use the new entity name.

   More information: *Customizing and Organizing Reports* (on page 95)
8. To publish customizations for the entity you are currently editing, on the Actions toolbar, click **Publish**.

   If you rename the entity after users are already using Microsoft Dynamics CRM, the change might not appear in the Navigation Pane for all users, because the Site Map is cached on client computers. Instruct your users to open Microsoft Dynamics CRM and then press **F5** to refresh the Navigation Pane.

   Note
   Renaming an entity does not change the entity name in the following places:
   - References to entity names in online Help.
   - Platform error messages and messages that are displayed in Trace or the event log. The entity names used in these messages cannot be edited or changed.

Related Topics

Understanding Entities 517

Edit the messages the entity displays to users to use the new entity name.

More information: *Edit Entity Messages* (on page 602)

Edit the existing reports to use the new entity name.

More information: *Customizing and Organizing Reports* (on page 95)

Edit the online Help files that refer to this entity.

More information: *Customizing Help (Microsoft Dynamics CRM SDK)* (see Customizing Help (Microsoft Dynamics CRM SDK) - *http://go.microsoft.com/fwlink/?LinkId=92346*)

Can I do this task?

This task requires the System Administrator or System Customizer security role or equivalent permissions. Customization tasks can be performed only while you are online. More information: *Customization Permissions* (on page 490)

You can view all the information, or properties, for an entity in a managed solution. However, because the managed solution itself can't be modified, you need to go to the customization area to edit properties for an entity.

1. In the Navigation Pane, click **Settings**.
2. Under **Customization**, click **Customizations**.
3. In the **Customization** area, click **Customize the System**.
4. Under **Components**, expand **Entities**, and then expand the entity you want.
5. In the main pane, you can edit the some or all of properties listed in the table, depending on the entity:

Option	Comments
Note (includes attachments)	Select this to create a relationship with the Note entity, and add a note control to the entity form. This allows users to make annotations for each record.

Activities	Select this to create a relationship with the activity entities, and add an associated view to the entity. This allows you to track activities such as phone calls, e-mails, and tasks. More information: *Understanding Activity Entities* (on page 517)
Connections	Select this to permit ad hoc connections between a record in this entity and records in other entities. More information: *Using Connections to Define How Records Relate* (see "*Using Connect to Define How Records Relate*" on page 44)
Sending e-mail (if an e-mail field does not exist, one will be created)	Select to add the **Send Direct E-mail** button to the main ribbon tab for the entity.
Mail merge	Select this to allow this entity to be used in a mail merge. More information: Mail Merge Documents
Document management	This allows you to track documents on SharePoint that are associated with a record in Microsoft Dynamics CRM. More information: About managing documents in Microsoft Dynamics CRM
Queues	Select this to use this entity in queues. More information: Work with Queues
Duplicate detection	Select this to detect duplicates for this entity. This feature notifies you of identical records in Microsoft Dynamics CRM, and allows you to resolve them. More information: *Avoiding Duplicate Records* (on page 69)
Auditing	Select this to track changes made to your business data. More information: *Auditing data in Microsoft Dynamics CRM* (on page 158, *./Help/ug_audit_about.htm*)
Mobile Express	Select this to display and use this entity in Mobile Express.
Reading pane in CRM for Outlook	Select this to display records in the reading pane in Microsoft Dynamics CRM for Microsoft Office Outlook.
Offline capability for CRM for Outlook	Select this to let users create, read, update, or delete records while offline.

6. Set entity privileges for security roles. By default, when an entity is created, only the System Administrator and System Customizer security roles have any privileges to read or change data in the custom entity. You must add privileges explicitly to all security roles that need to use the new entity. For any security roles that need to use the new entity, add the needed privileges:
   a. On the Navigation Pane click **Settings**.
   b. Click **Administration**.
   c. Click **Security Roles**, open a security role, and then click the **Custom Entities** tab.
   d. When adding privileges, you can follow the pattern for the privileges that are used on the **Marketing**, **Sales**, or **Service** tabs for the security role to provide users the same level of access to the custom entity that they have to other entities. More information: *Customization Permissions* (on page 490)
7. Publish your customizations:

- To publish customizations for only the component that you are currently editing, on the **Home** tab, in the **Save** group, click **Publish**.
- To publish customizations for all unpublished components at one time, click **Publish All Customizations**.

Important
Any time you change user interface elements or implement form scripts for an entity, you must publish changes to apply them. Any customizations that change the data schema of Microsoft Dynamics CRM such as custom entities, relationships, or fields are applied immediately.

Related Topics

Understanding Entities 517
Entity Relationships 592

Can I do this task?

This task requires the System Administrator or System Customizer security role or equivalent permissions. Customization tasks can be performed only while you are online. More information: *Customization Permissions* (on page 490)

You can view all the information, or properties, for an entity in the default solution. However, because many of the properties were set when the entity was created, only some of them can be edited. The table lists the editable properties.

1. In the Navigation Pane, click **Settings**.
2. Under **Customization**, click **Customizations**.
3. In the **Customization** area, click **Customize the System**.
4. Under **Components**, expand **Entities**, and then expand the entity you want.
5. In the main pane, you can edit some or all of the properties listed in the table, depending on the entity:

Option	Comments
Note (includes attachments)	Select this to create a relationship with the Note entity, and add a note control to the entity form. This allows users to make annotations for each record.
Activities	Select this to create a relationship with the activity entities, and add an associated view to the entity. This allows you to track activities such as phone calls, e-mails, and tasks. More information: *Understanding Activity Entities* (on page 517)

Connections	Select this to permit ad hoc connections between a record in this entity and records in other entities. More information: *Using Connections to Define How Records Relate* (see "*Using Connect to Define How Records Relate*" on page 44)
Sending e-mail (if an e-mail field does not exist, one will be created)	Select to add the **Send Direct E-mail** button to the main ribbon tab for the entity.
Mail merge	Select this to allow this entity to be used in a mail merge. More information: Mail Merge Documents
Document management	This allows you to track documents on SharePoint that are associated with a record in Microsoft Dynamics CRM. More information: About managing documents in Microsoft Dynamics CRM
Queues	Select this to use this entity in queues. More information: Work with Queues
Duplicate detection	Select this to detect duplicates for this entity. This feature notifies you of identical records in Microsoft Dynamics CRM, and allows you to resolve them. More information: *Avoiding Duplicate Records* (on page 69)
Auditing	Select this to track changes made to your business data. More information: *Auditing data in Microsoft Dynamics CRM* (on page 158, *./Help/ug_audit_about.htm*)
Mobile Express	Select this to display and use this entity in Mobile Express.
Reading pane in CRM for Outlook	Select this to display records in the reading pane in Microsoft Dynamics CRM for Microsoft Office Outlook.
Offline capability for CRM for Outlook	Select this to let users create, read, update, or delete records while offline.

6. Set entity privileges for security roles. By default, when an entity is created, only the System Administrator and System Customizer security roles have any privileges to read or change data in the custom entity. You must add privileges explicitly to all security roles that need to use the new entity. For any security roles that need to use the new entity, add the needed privileges:
   a. On the Navigation Pane, click **Settings**.
   b. Click **Administration**.
   c. Cick **Security Roles**, click a security role, and then click the **Custom Entities** tab. You can edit the properties.
   d. Click **Save and Close**.

   When adding privileges, you can follow the pattern for the privileges that are used on the **Marketing**, **Sales**, or **Service** tabs for the security role to provide users the same level of access to the custom entity that they have to other entities. More information: *Customization Permissions* (on page 490)
7. Publish your customizations:

- To publish customizations for only the component that you are currently editing, on the **Home** tab, in the **Save** group, click **Publish**.
- To publish customizations for all unpublished components at one time, click **Publish All Customizations**.

Important
Any time you change user interface elements or implement form scripts for an entity, you must publish changes to apply them. Any customizations that change the data schema of Microsoft Dynamics CRM such as custom entities, relationships, or fields are applied immediately.

Related Topics

Understanding Entities 517
Entity Relationships 592

You can view all the information, or properties, for an entity in an unmanaged solution. However, many of the properties can be set only when creating the entity. Only some of properties can be edited. The table lists the editable properties.

1. In the Navigation Pane, click **Settings**.
2. Under **Customization**, click **Customizations**.
3. In the **Customization** area, click **Customize the System**.
4. Under **Components**, expand **Entities**, and then expand the entity you want.
5. In the main pane, you can edit the some or all of properties listed in the table, depending on the entity:

Option	Comments
Note (includes attachments)	Select this to create a relationship with the Note entity, and add a note control to the entity form. This allows users to make annotations for each record.
Activities	Select this to create a relationship with the activity entities, and add an associated view to the entity. This allows you to track activities such as phone calls, e-mails, and tasks. More information: *Understanding Activity Entities* (on page 517)
Connections	Select this to permit ad hoc connections between a record in this entity and records in other entities. More information: *Using Connections to Define How Records Relate* (see "*Using Connect to Define How Records Relate*" on page 44)
Sending e-mail (if an e-mail field does not exist, one will be created)	Select to add the **Send Direct E-mail** button to the main ribbon tab for the entity.
Mail merge	Select this to allow this entity to be used in a mail merge. More information: Mail Merge Documents

Document management	This allows you to track documents on SharePoint that are associated with a record in Microsoft Dynamics CRM. More information: About managing documents in Microsoft Dynamics CRM
Queues	Select this to use this entity in queues. More information: Work with Queues
Duplicate detection	Select this to detect duplicates for this entity. This feature notifies you of identical records in Microsoft Dynamics CRM, and allows you to resolve them. More information: *Avoiding Duplicate Records* (on page 69)
Auditing	Select this to track changes made to your business data. More information: *Auditing data in Microsoft Dynamics CRM* (on page 158, *./Help/ug_audit_about.htm*)
Mobile Express	Select this to display and use this entity in Mobile Express.
Reading pane in CRM for Outlook	Select this to display records in the reading pane in Microsoft Dynamics CRM for Microsoft Office Outlook.
Offline capability for CRM for Outlook	Select this to let users create, read, update, or delete records while offline.

6. Set entity privileges for security roles. By default, when an entity is created, only the System Administrator and System Customizer security roles have any privileges to read or change data in the custom entity. You must add privileges explicitly to all security roles that need to use the new entity. For any security roles that need to use the new entity, add the needed privileges:
   a. On the Navigation Pane click **Settings**.
   b. Click **Administration**.
   c. Click **Security Roles**, open a security role, and then click the **Custom Entities** tab.
   d. When adding privileges, you can follow the pattern for the privileges that are used on the **Marketing**, **Sales**, or **Service** tabs for the security role to provide users the same level of access to the custom entity that they have to other entities. More information: *Customization Permissions* (on page 490)
7. Publish your customizations:
   - To publish customizations for only the component that you are currently editing, on the **Home** tab, in the **Save** group, click **Publish**.
   - To publish customizations for all unpublished components at one time, click **Publish All Customizations**.

Important
Any time you change user interface elements or implement form scripts for an entity, you must publish changes to apply them. Any customizations that change the data schema of Microsoft Dynamics CRM such as custom entities, relationships, or fields are applied immediately.

Related Topics

Understanding Entities 517
Entity Relationships 592

Can I do this task?

This task requires the System Administrator or System Customizer security role or equivalent permissions. Customization tasks can be performed only while you are online. More information: *Customization Permissions* (on page 490)

When you create a custom entity, default icons are provided. You can upload and use icons of your choice. You cannot modify the icons for system entities.

Before you begin, you must have uploaded the icons as web resources. More information: Add or edit a form web resource

There are three types of icons:

Icon in Web application

This icon should be:

- 16 × 16 pixels in size.
- In .gif format.
- No larger than 10 kilobytes.

Shortcut icon in Microsoft Dynamics CRM for Microsoft Office Outlook

This icon should be:

- 32x32 pixels in size
- With 16 colors
- In .gif, .png, .jpg, or .ico format
- No larger than 10 kilobytes

Icon in Entity forms

This icon should be:

- 66x48 pixels in size
- In .gif, .png, or .jpg format
- No larger than 10 kilobytes

1. In the Navigation Pane, click **Settings**.
2. Under **Customization**, click **Customizations**.
3. In the **Customization** area, click **Customize the System**.

4. Under **Entities**, click the custom entity for which you want to update the icon. If this is a custom icon, on the toolbar on the top, click the **Update Icons** button.
5. In the **Select New Icons** dialog box, in the section for which you'd like to add an icon, click the **Browse** button to assign the path for the image file.
6. Click **OK**.
7. Publish your customizations:
   - To publish customizations for only the component that you are currently editing, on the **Home** tab, in the **Save** group, click **Publish**.
   - To publish customizations for all unpublished components at one time, click **Publish All Customizations**.

   You might not see the new icons in Microsoft Dynamics CRM until you close and reopen the Microsoft Dynamics CRM client.

Related Topics

Understanding Entities 517

Icon in Web application

This icon should be:

- 16 x 16 pixels in size.
- In .gif, .png, or .jpg format.
- No larger than 10 kilobytes.

Shortcut icon in Microsoft Dynamics CRM for Microsoft Office Outlook

This icon should be:

- 32 x 32 pixels in size.
- 16 colors.
- In .ico format.
- No larger than 10 kilobytes.

Icon in Entity forms

This icon should be:

- 66x48 pixels in size
- In .gif, .png, .jpg, or .ico format
- No larger than 10 kilobytes

Import Translations

Import Translations

Export translations

Export Translations

Add or edit event scripts for fields and forms

Add or edit a form web resource

Add event handlers for form events (on page 536)

Add event handlers for field events (on page **Error! Bookmark not defined.**)

Below you will find sample scripts for each available event.

Warning: You should have a thorough knowledge of programming syntax and logic before adding scripts, and should test your scripts before you publish customizations. Malformed scripts can prevent the form from working correctly.

Add or edit a form web resource

1. In the Navigation Pane, click **Settings**.
2. Under **Customization**, click **Customizations**.
3. In the **Customization** area, click **Customize the System**.
4. Under **Components**, expand **Entities**, and then expand the entity you want.
5. Click **Forms**. In the list, click a form to edit it if it has a **Form Type** of **Main**.

   You can add a Web resource that is an image, an HTML file, a Silverlight control, or a JScript library.
6. To add a Web resource, click the tab in which you'd like to insert it, and then on the **Insert** tab, click **Web Resource**.

   - OR -

   To edit a Web resource, select a tab and the Web resource that you want to edit, and then on the **Home** tab, click **Change Properties**.

7. In the **Add Web Resource** or **Web Resource Properties** dialog box, on the **General** tab, enter the information you want. In particular, note the following:
   - In the **Web Resource** box, select the image, HTML, Silverlight, or JScript library Web resource that you want.
   - In the **Name** box, enter a unique name for the field. The name can contain only alphanumeric characters and underscores.
   - After you add a Web resource, the **Web Resource Properties** section appears on this tab. It has options to set custom parameters or pass a record object-type code as a parameter.
8. On the **Formatting** tab, that options that are displayed depend on the section formatting options. In any case, you can determine the number of rows for the field, whether a border is displayed, and the scrolling type.
9. On the **Dependencies** tab, from the **Available fields** list, select the fields that are required by the Web resource, and then click the **Add Selected Records** button to move the selected fields to the **Dependent fields** list.
10. Click **OK**.
11. When you finish editing the form, click **Save and Close** to close the form.
12. You can preview how the main form will appear and how events will function:
    a. On the **Home** tab, click **Preview**, and then select **Create Form**, **Update Form**, or **Read-Only Form**.
    b. To close the **Preview** form, on the **File** menu, click **Close**.
13. When your customizations are complete, publish them:
    - To publish customizations for only the component that you are currently editing, on the **Home** tab, in the **Save** group, click **Publish**.
    - To publish customizations for all unpublished components at one time, click **Publish All Customizations**.

Add event handlers for form events

Can I do this task?

This task requires the System Administrator or System Customizer security role or equivalent permissions. Customization tasks can be performed only while you are online. More information: *Customization Permissions* (on page 490)

More information: *Form Scripting* (on page 532)

1. In the Navigation Pane, click **Settings**.
2. Under **Customization**, click **Customizations**.
3. In the **Customization** area, click **Customize the System**.
4. Under **Components**, expand **Entities**, and then expand the entity you want.
5. Click **Forms**. In the list, click a form to edit it if it has a **Form Type** of **Main**.

6. On the **Home** tab, click **Form Properties**.
7. On the **Events** tab, in the **Event Handlers** section, select **onSave** or **OnLoad**, and then click **Edit**.
8. In the **Handler Properties** dialog box, supply the requested information. Select the **Enabled** check box to make the function available to be called by a field event.
9. On the **Non-Event Dependencies** tab, in the **Available fields** list, select any fields you have referenced in scripts, and then click the **Add Selected Records** button to move the selected fields to the **Dependent fields** list.
10. Click **OK** to close the **Handler Properties** dialog box.
11. Click **OK** to close the **Form Properties** dialog box.
12. Click **Save and Close** to close the form.
13. When your customizations are complete, publish them:
    - To publish customizations for only the component that you are currently editing, on the **Home** tab, in the **Save** group, click **Publish**.
    - To publish customizations for all unpublished components at one time, click **Publish All Customizations**.

Important

- You should have a thorough knowledge of JScript programming syntax and an understanding of the Xrm.Page object model before adding scripts, and should test your scripts before you publish customizations. Malformed scripts can prevent the form from working correctly.
- When you use an event-based script or custom code that refers to specific fields, you should set these fields as dependent fields so that they cannot be deleted from forms.

Related Topics

Form Scripting 532
Understanding Entities 517
Test an event script 536

Add event handlers for field events

Can I do this task?

This task requires the System Administrator or System Customizer security role or equivalent permissions. Customization tasks can be performed only while you are online. More information: *Customization Permissions* (on page 490)

More information: *Form Scripting* (on page 532)

1. In the Navigation Pane, click **Settings**.
2. Under **Customization**, click **Customizations**.

3. In the **Customization** area, click **Customize the System**.
4. Under **Components**, expand **Entities**, and then expand the entity you want.
5. Click **Forms**. In the list, click a form to edit it if it has a **Form Type** of **Main**.
6. On the **Home** tab, in the **Select** group, click **Body**.
7. In the main pane, double-click the field to which you would like to add an event.
8. In the **Field Properties** dialog box, on the **Events** tab, select one of the available events, and then click **Add**.
9. In the **Handler Properties** dialog box, supply the requested information. Select the **Enabled** check box to make the function available to be called by a field event.
10. Click **OK** to close the **Handler Properties** dialog box.
11. Click **OK** to close the **Field Properties** dialog box.
12. Test your script in the three modes a form can be used: create, update, and read-only:
    a. On the **Home** tab, click **Preview**, and then select **Create Form**, **Update Form**, or **Read-Only Form**.
    b. For the create and update modes, enter data in the field and move focus off the field by selecting a different field to verify that the script executes.
    c. To close the **Preview** form, on the **File** menu, click **Close**.
13. Click **Save and Close** to close the form.
14. When your customizations are complete, publish them:
    - To publish customizations for only the component that you are currently editing, on the **Home** tab, in the **Save** group, click **Publish**.
    - To publish customizations for all unpublished components at one time, click **Publish All Customizations**.

Important

- You should have a thorough knowledge of JScript programming syntax and an understanding of the Xrm.Page object model before adding scripts, and should test your scripts before you publish customizations. Malformed scripts can prevent the form from working correctly.
- When you use an event-based script or custom code that refers to specific fields, you should set these fields as dependent fields so that they cannot be deleted from forms.

Related Topics

Form Scripting 532
Understanding Entities 517
Test an event script 536

Form Scripting

Form scripting allows a customizer to create a script to perform a variety of actions within the Microsoft Dynamics CRM client application running in Microsoft Internet Explorer on the user's computer, including Microsoft Dynamics CRM for Outlook. When data is available in the client, using scripts to perform actions there provides better performance than using methods that require the user to save the record to perform the actions on the Web server.

To do customizations that affect the full Microsoft Dynamics CRM organization, you must have the System Administrator or System Customizer security role, or equivalent privileges.

Scripts can perform a wide range of actions, such as:

- Calculate the values in a form.
- Use Web services to retrieve data on or to update external data sources.
- Interact with an HTML page or Web application on the same domain within an IFrame.
- Perform actions on Microsoft Dynamics CRM data using Microsoft Dynamics CRM Web services.
- Perform additional data validation.

When you develop scripts that interact with forms, be sure to use only the supported objects, properties, and methods which are documented in the *Microsoft Dynamics CRM SDK* http://go.microsoft.com/fwlink/?LinkId=191610. This will help to ensure that your form scripting customizations can be upgraded to the next version of Microsoft Dynamics CRM.

Associating Scripts with Events

In Microsoft Dynamics CRM, write a script using JScript. Associate the script with events on the Microsoft Dynamics CRM form or fields within the form.

Microsoft Dynamics CRM supports the following events on every *entity form*: OnLoad, OnSave, TabStateChange, and OnReadyStateComplete. The TabStateChange event indicates when the tab is expanded or collapsed.

The OnChange event is available *on every field in the form*.

This means that you can include logic within a form to run when the form loads, when a user saves the form, or when the value of a field on the form changes.

This event occurs whenever a user changes data in the field and the user clicks a different form element. Clicking another form element indicates that the user has finished making the changes in the field. Microsoft Dynamics CRM processes the OnChange event first, and then the data in the field is validated again following the execution of the OnChange event code.

Developing Scripts

Scripts can perform a wide range of actions, such as:

- Calculating values with in a form.
- Using Web services to retrieve data from or update external data sources.

- Peforming actions on Microsoft Dynamics CRM data using the Microsoft Dynamics CRM Web services.
- Performing additional data validation.

When developing scripts that interact with Microsoft Dynamics CRM forms, be sure to only use supported objects, properties, and methods, which are documented in the Microsoft Dynamics CRM Client Programming Guide. Using supported objects, properties, and methods will help ensure that your form scripting customizations can be upgraded to the next version of Microsoft Dynamics CRM.

Adding Scripts

Each form or field provides an **Events** dialog where scripts can be pasted and enabled. After you save and publish the event, the scripts become part of the metadata for the entity. This means that they can be exported and imported with other customizations.

Always set dependencies on any form fields referenced in your scripts. Removing a field that a script references causes an error when the script runs. Set such a field as dependant helps to prevent the accidental removal of a field that a script references. More information: *Add event handlers for field events* (on page **Error! Bookmark not defined.**), *Add event handlers for form events* (on page 536)

Test an event script

Can I do this task?

This task requires the System Administrator or System Customizer security role or equivalent permissions. Customization tasks can be performed only while you are online. More information: *Customization Permissions* (on page 490)

You should always test your scripts before publishing your customizations.

1. In the Navigation Pane, click **Settings**.
2. Under **Customization**, click **Customizations**.
3. In the **Customization** area, click **Customize the System**.
4. Under **Components**, expand **Entities**, and then expand the entity you want.
5. Click **Forms**. In the list, click a form to edit it if it has a **Form Type** of **Main**.
6. On the **Home** tab, click **Preview**, and then select **Create Form**, **Update Form**, or **Read-Only Form**.
7. If you have added an **OnLoad** event for the form, when you open the form in each mode, verify that your event executed as expected.
   - If your code depends on data existing in the form when it loads, you may want to test your script in an **onChange** or **onSave** event so that you can enter sample data into the form. The **Update Form** will open with no data.
8. If you have added an **onChange** event for a field, for create and update modes, enter the data in the field and verify that the event executes as expected.
9. If you have added an **onSave** event for the form, for create and update modes, on the top of the dialog box, click **Simulate Form Save** to see if the event executes as expected.

10. To close the **Preview** form, on the **File** menu, click **Close**.

Related Topics

Form Scripting 532
Understanding Entities 517

Understanding entity fields

Fields can be divided into two categories.

- **Business field.** This is any standard field that comes with Microsoft Dynamics CRM. It can be customized or added to a solution. When part of a solution, a business field might be further customizable, depending on restrictions placed on the field when creating the solution.
- **Custom field.** A user with the System Administrator or System Customizer security role, or equivalent permissions, can create a custom field in the customization area. You can include a custom field in a solution. A custom field might be further customizable, depending on restrictions placed on the field when it was created.

More information: Create or Edit Entity Attributes

Mapping Entity Fields

Mapping streamlines data entry when you create new records that are associated with another record. When two entities have an entity relationship, it is possible to create new related entity records from the associated view visible on the primary entity. When the user creates a new record from an associated view, mapped data from the primary entity record is copied to the form for the new related entity record. You control what data is copied by adding new mappings in the relationship between the two entities. If a record is created any way other than from the associated view of the primary entity, data is not mapped.

Mapping only applies just before a new record is created from an associated view. Users are able to make changes before saving the record. Later changes to the data in the primary record are not applied to the related record.

Create or edit attributes for an entity

Any time you change user interface elements or implement form scripts for an entity, you must publish changes to apply them. Any customizations that change the data schema of Microsoft Dynamics CRM such as custom entities, relationships, or fields are applied immediately.

After you create new fields, be sure to include them on the forms and views for the entity so that they are available from the Microsoft Dynamics CRM user interface. You can also add the new fields to relevant reports.

1. In the Navigation Pane, click **Settings**.
2. Under **Customization**, click **Customizations**.
3. In the **Customization** area, click **Customize the System**.
4. Under **Components**, expand **Entities**, and then expand the entity you want.
5. Click **Fields**.
6. To add a new field, on the Actions toolbar, click the **New** button.

   Enter a **Display Name**. A **Name** will be generated based on the **Display Name**.

   - OR -

   To edit an field, select it in the list, and then on the Actions toolbar, click the **Edit** button.
7. In **Requirement Level**, select one of the following:
   - No Constraint
   - Business Recommended
   - Business Required
8. In **Searchable**, select whether to include this in the list of fields shown in Advanced Find for this entity and also in the list of fields available when customizing the find columns in the quick find view and the lookup view.
9. For **Field Security**, enable or disable the feature for this field. More information: Add or remove security for a field
10. For **Auditing**, enable or disable the feature for this field. More information: *Auditing data in Microsoft Dynamics CRM* (on page 158, *./Help/ug_audit_about.htm*)

    Important
    If you enable auditing, be aware that auditing tracks value changes to the field, but does not track enabling or disabling Field Security for the field.
11. For new fields, select the **Type**, and then enter required information for the specified type. For existing fields, you cannot modify the type, but you can modify the settings for the type.

    See a list of possible data types for a field.

Data Type	Notes
Single Line of Text	The following formats are available: ▪ **E-mail.** This opens a new e-mail message in the default e-mail software when clicked. ▪ **Text.** This creates a text box. ▪ **Text area.** This creates a scrolling text box. ▪ **URL.** This opens the URL in the user's default browser when clicked. ▪ **Ticker Symbol.** This create a stock ticker symbol in all capital letters. Click the symbol to open information about the stock in the user's default browser. By default, the MSN Web site opens. ▪ **Version Number.** This creates a text box with this information.
Option Set	Select an existing option set, or define a new one.
Two Options	After creating this field, configure it in the form to which it was added. In the form, select whether the field is displayed as option buttons (also known as radio buttons), a check box, or a list.
Whole Number	The following formats are available for this field: ▪ **None.** The defaults are integer values between -2,147,483,648 and 2,147,483,648, although you can set different minimum and maximum values. ▪ **Duration.** This creates a drop-down list box with values in minutes, hours, and days. ▪ **Time Zone.** This creates a drop-down list box with options for every available time zone. ▪ **Language.** This creates a drop-down list box with options for every language that your organization has made available for users.
Floating Point Number	Select up to 5 precision points. You can set the minimum and maximum values.
Decimal Number	Select up to 10 decimal points. You can set the minimum and maximum values.
Currency	When you add a currency field to an entity, a corresponding (Base) field is created also. The (Base) field also has a currency data type. If the entity does not already have a field with a currency data type, two additional fields are created: ▪ Currency. A lookup data type whose value must be set before you can set the value of a field with a currency data type. ▪ Exchange Rate. This has a decimal number data type.
Multiple Lines of Text	This is a scrolling text box. You can set the maximum number of characters for this field.
Date and Time	There are two formats: date only, or date and time.

Lookup	You can create a lookup field using an entity relationship that has already been created, but not yet used with another lookup field. If you create a lookup field in an entity form, the relationship is automatically generated. A lookup field is created as a relationship field.

12. Set Status Reason options

Many entities have the status reason system attribute that may be customized. The status reason attribute is displayed like a picklist attribute except that it also contains a reference to the status attribute.

Valid values for Status Reason are dependant on the Status (state) attribute. You must first select the appropriate status before you can set the Status Reason options.

NOTE: Status Reason is not customizable for activities integrated with Microsoft Office Outlook: Task, E-mail and Appointment.

1. Select the IME mode for this attribute.

An Input Method Editor (IME) lets you to enter and edit Chinese, Japanese, and Korean characters. These Asian writing systems have more characters than can be encoded for a regular keyboard. The IMEs for these languages use sequences of base characters that describe an individual character or group of characters to enter a larger set of characters. Base characters can be component letters from Hangul syllables, phonetic components for Japanese kanji characters, or various combinations for Chinese characters. You can use the IME mode option to quickly enter these characters and symbols into text boxes, avoiding the manual switch to IME mode that would otherwise be required.

Input Method Editors have two principle states, inactive and active. The inactive mode behaves like a regular keyboard and uses a limited set of characters. The active mode accepts Chinese, Japanese, or Korean characters.

The following IME modes are available:

- **auto** (default)

  The IME mode is not affected with this choice.

- **active**

  All characters are entered in the IME mode, but you can still deactivate it. For name-related fields and addresses, the default is active for detailed forms.

- **inactive**

  All characters are entered without using the IME mode, but you can still activate it. For datetime type fields, the default is inactive for detailed forms.

- **disabled**

  The IME mode is disabled, and you cannot activate it. For number type fields (money, int, float), the default is inactive for detailed forms.

1. Click **Save and Close** to close the form editor.
2. To publish view customizations for just one entity, in the Navigation Pane, click **Entities**. Then, on the Actions toolbar, click the **Publish** button.
3. To publish all customizations you have made to any entities or components, on the Actions toolbar, click the **Publish All Customizations** button.

Tip

To change the name prefix for all new entities and fields, in the Navigation Pane, click **Settings**, click **Administration**, click **System Settings**, click the **Customization** tab, and then enter the prefix in the **Prefix** field.Each new entity or field created in Microsoft Dynamics CRM uses a prefix on the name to identify that the entity or field is not a system entity or a system attribute. The default value is "New_". Using different prefix values provides a method to group customizations by the publisher.

Related Topics

Understanding Hierarchical Entity Relationships 592

Edit form field properties

1. On the form body, double-click the field you want to edit.
2. On **Field Properties**, you can edit the following:
   - The **Display** tab:
     - Change the label used for this field. This does not change the field display name. It only changes the text in this form. You can also choose to not display the name.
     - Select or clear the **Field is read-only** check box.
     - In the **Locking** section, specify whether you wish to lock the field to the form by selecting **Lock the field on the form**. This prevents anyone from removing this field.
     - Select the **Visible by default** check box if you want to display the field. If you clear this check box, the field does not display in the **Reading Pane** in Microsoft Dynamics CRM for Microsoft Office Outlook. The field displays in the Microsoft Dynamics CRM web application unless you use JScript to define other behavior. In the web application, JScript overrides this check box.
     - For lookup fields, this tab displays extra properties. In the **Related Records Filtering** section, to filter the list of displayed records in the lookup, select the **Only show records where** check box.

       This table specifies the relationship combinations that are possible when you filter related records.

First list relationship	Second list relationship	Available?
N:1	1:N	Yes
N:1	N:1	Yes
N:1	N:N	Yes
1:N	1:N	Yes
1:N	N:1	No
1:N	N:N	No
N:N	1:N	Yes

N:N	N:1	No
N:N	N:N	No

The first list is populated with all the potential relationships you can use to filter this lookup. Click one.

The second list is then populated with all relationships that connect the related entity (selected in first list) to the target entity. Click one.

Select the **Allow users to turn off filter** check box to give users the option of turning off the filter you define here. This makes it possible for them to view a wider range of records. If you want to make sure that users only see the limited range of records defined by this filter, clear this check box.

- Also, for lookup fields, the tab displays the **Additional Properties** section. Here, select the **Display Search box in lookup dialog** check box if you want a search box to be available in the lookup.

  In the **Default View** list, click the default view for which results will be displayed in the lookup.

  If you want users to also have the option of selecting other views, select the **Enable the View selection in lookup dialog** check box.

- The **Formatting** tab:
  - The displayed formatting options depend on the formatting options that are set for the section.
- The **Details** tab:
  - These are the basic field properties. Click **Edit** to modify them.
- On the **Events** tab:
  - In the **Form Libraries** section, add or remove the available JScript libraries for form or field events. You can edit the listed custom libraries.
  - In the **Event Handlers** section, add a JScript library (a script web resource) authored by a developer and associate a function within that library to an event.

  1. In the **Events** list, click **onChange**, and then click **Add**.
  2. In the **Handler Properties** dialog box, supply the requested information. Select the **Enabled** check box to make the function available to be called by a field event.
  3. Click **OK**.

  More information: *Add or edit event scripts for fields and forms* (on page 532)

3. Click **OK**.

Create and Configure Views Links

Create or edit a public view (see "*Create or edit a public view for an entity*" on page 544)

Edit the Advanced Find view (on page 551)

Edit the associated view (on page 556)

Edit the lookup view (on page 554)

Edit the Quick Find view (on page 547)

You can also do the following:

Set the default public view (see "*Set the default view for an entity*" on page 550)

Work with Security Roles

Delete a view (on page 559)

Create or edit a public view for an entity

Can I do this task?

This task requires the System Administrator or System Customizer security role or equivalent permissions. Customization tasks can be performed only while you are online. More information: *Customization Permissions* (on page 490)

If you edit a public view, the changes are visible to everyone who has permission to view records for the entity. Each entity must have one default public view.

Besides public views, the following views are provided for all entities and cannot be deleted or shared: Quick Find Views, Advanced Find Views, associated views, and lookup views.

1. In the Navigation Pane, click **Settings**.
2. Under **Customization**, click **Customizations**.
3. In the **Customization** area, click **Customize the System**.
4. Under **Components**, expand **Entities**, and then expand the entity you want.
5. Click **Views**.
6. To create a new public view, on the Actions toolbar, click **New**. On the **View Properties** dialog box, in the **Name** box, type a name for the new view, and then click **OK**.

   If the **New** button does not appear, you cannot add views for the entity you selected.

   - OR -

   To edit a view, double-click a **Public View** in the list. The view type is specified in the **Type** column.
7. Modify the columns that are displayed.

   - Add a column:

   a. In the **Common Tasks** area, for Quick Find Views, click **Add View Columns**, or for other types of views, click **Add Columns**.

   b. Select the check boxes for the columns you want to add, and then click **OK**.

   - Move a column:

   a. Click the column you want to move.

b. In the **Common Tasks** area, use the arrows to move the column left or right.

- Change the width of a column:

a. Click the column you want to change.

b. In the **Common Tasks** area, click **Change Properties**.

c. In the **Change Column Properties** dialog box, click an option to set the column width, and then click **OK**.

- Remove a column:

a. Click the column you want to remove.

b. In the **Common Tasks** area, click **Remove**.

c. In the confirmation message, click **OK**.

- Change the sort order of a column:

a. In the **Common Tasks** area, click **Configure Sorting**.

b. In the **Configure Sort Order** dialog box, in the **Column** list, select the column you want to sort, then click **Ascending Order** or **Descending Order**, and then click **OK**.

- Enable online presence for instant messaging:

a. In the **View** form for the selected entity, click the column you want to change.

b. In the **Common Tasks** area, click **Change Properties**.

c. In the **Change Column Properties** dialog box, select the **Enable Presence for this column**, and then click **OK**.

8. Edit the filter criteria for a view

   The filter criteria is set using the same user interface as Advanced Find.

   a. Click **Edit Filter Criteria**.

   The **Edit Filter Criteria** dialog box is in Detailed mode by default.

   b. To add a criteria row:

      1. Click **Select** to specify the field to filter on.
      2. Click the query relational operator, and select an operator.
      3. Click **Enter Value**, and enter a value to filter on. For some values, you can click the **Select or change the values for this field** button to open the **Select Values** dialog box and select the value you want.

   c. To group criteria, you must select two or more rows for the same record type. For example, **Sales Stage** and **Est. Revenue** are both field values in the **Opportunity** record type and two rows that specify filter criteria for these fields can be grouped. However, rows with field values from different record types, such as **Account** and **Opportunity** record types, cannot be grouped.

      1. For each row you want to group, in detailed mode, click the **Options menu** button for that row, and then click **Select Row**.

2. On the Filter toolbar, select **Group AND** or **Group OR**.
3. To remove a row from a group, click the **Options menu** button for that row, and then click **Delete**.
4. To select a group, click the **Options menu** button for that group, and then click **Select Group**.
5. To add a criteria clause to a group, click the **Options menu** button for that group, click **Add Clause**, and then select the field, query relational operator, and value.
6. To unselect a group that has been previously selected, click the **Options menu** button for that group, and then click **Deselect Group**.
7. To ungroup a group, click the **Options menu** button for that group, and then click **Ungroup**.
8. To change a **Group AND** group to a **Group OR** group, or a **Group OR** group to a **Group AND** group, click the **Options menu** button for that group, and then click **Change to OR** or **Change to AND**.

d. To remove a row, click the **Options menu** button for that row, and then click **Delete**. In the confirmation message, click **OK**.

e. Click **Clear** to remove all criteria and start over.

f. In the **Edit Filter Criteria** dialog box, click **OK**.

9. Set the default public view.

Change the appointments view

Can I do this task?

This task requires the System Administrator or System Customizer security role or equivalent permissions. Customization tasks can be performed only while you are online. More information: *Customization Permissions* (on page 490)

You can change the default view in the **View** list when users open an area that displays a list of entities such as appointments, accounts, or contacts. For example, if your organization is set up so that users manage their own appointments, you can change the default view for **Appointments** from **All Appointments** to **My Appointments**.

You can make any public view, including custom views, the default view for an entity. The status is listed in the **Status** column in the **Forms and Views** list.

1. In the Navigation Pane, click **Settings**, click **Customizations**, and then click **Customize the System**.
2. In the **View** list, select **Customize the System**.
3. In the list of customizable entities, double-click the entity for which you want to set a default view.
4. Under **Common**, click **Forms and Views**, and then in the **View** list, select **Public Views**.
5. In the list of views, select the public view you want to set as the default. The view type is indicated in the **Type** column.
6. On the Actions toolbar, click **Actions**, and then click **Set Default**.
7. On the **Actions** menu, click **Publish**.

8. Click **Save** or **Save and Close**.

   Notes

   - The default public view is listed as **Default Public View** in the **Type** column.
   - Not all record types have public views. If there are no public views you cannot set a default.

Customize the entity view

1. Click **Save and Close** to close the view.
2. To publish view customizations for just one entity, in the Navigation Pane, click **Entities**. Then, on the Actions toolbar, click the **Publish** button.

   To publish all customizations you have made to any entities or components, on the Actions toolbar, click the **Publish All Customizations** button.

   Tip
   To create views that appear in the Service calendar, create views in the **Service Activity**, **Appointment**, **User**, or **Facility**/**Equipment** entities. To see views created in these entities from the Service calendar, users select the view type from the **Type** list.

   Important
   Any time you change user interface elements or implement form scripts for an entity, you must publish changes to apply them. Any customizations that change the data schema of Microsoft Dynamics CRM such as custom entities, relationships, or fields are applied immediately.

Related Topics

Understanding Entities 517
Find Things 9

Edit the Quick Find view

Can I do this task?

This task requires the System Administrator or System Customizer security role or equivalent permissions. Customization tasks can be performed only while you are online. More information: *Customization Permissions* (on page 490)

If you edit a Quick Find view, the changes set the default for everyone who uses the search box for the entity.

1. In the Navigation Pane, click **Settings**.
2. Under **Customization**, click **Customizations**.
3. In the **Customization** area, click **Customize the System**.
4. Under **Components**, expand **Entities**, and then expand the entity you want.

5. Click **Views**.
6. In the **Type** column, locate **Quick Find View**. Double-click the view.
7. Modify the fields that are searched.
   a. In the **Common Tasks** pane, click **Add Find Columns**.
   b. Select the check boxes for the columns you want to add, and then click **OK**.
8. Modify the columns that are displayed.
   - Add a column:
   a. In the **Common Tasks** area, for Quick Find Views, click **Add View Columns**, or for other types of views, click **Add Columns**.
   b. Select the check boxes for the columns you want to add, and then click **OK**.
   - Move a column:
   a. Click the column you want to move.
   b. In the **Common Tasks** area, use the arrows to move the column left or right.
   - Change the width of a column:
   a. Click the column you want to change.
   b. In the **Common Tasks** area, click **Change Properties**.
   c. In the **Change Column Properties** dialog box, click an option to set the column width, and then click **OK**.
   - Remove a column:
   a. Click the column you want to remove.
   b. In the **Common Tasks** area, click **Remove**.
   c. In the confirmation message, click **OK**.
   - Change the sort order of a column:
   a. In the **Common Tasks** area, click **Configure Sorting**.
   b. In the **Configure Sort Order** dialog box, in the **Column** list, select the column you want to sort, then click **Ascending Order** or **Descending Order**, and then click **OK**.
   - Enable online presence for instant messaging:
   a. In the **View** form for the selected entity, click the column you want to change.
   b. In the **Common Tasks** area, click **Change Properties**.
   c. In the **Change Column Properties** dialog box, select the **Enable Presence for this column**, and then click **OK**.
9. Edit the filter criteria for a view.

   The filter criteria is set using the same user interface as Advanced Find.

   - Click **Edit Filter Criteria**.

The **Edit Filter Criteria** dialog box is in Detailed mode by default.

- To add a criteria row:

a. Click **Select** to specify the field to filter on.

b. Click the query relational operator, and select an operator.

c. Click **Enter Value**, and enter a value to filter on. For some values, you can click the **Select or change the values for this field** button to open the **Select Values** dialog box and select the value you want.

- To group criteria, you must select two or more rows for the same record type. For example, **Sales Stage** and **Est. Revenue** are both field values in the **Opportunity** record type and two rows that specify filter criteria for these fields can be grouped. However, rows with field values from different record types, such as **Account** and **Opportunity** record types, cannot be grouped.

a. For each row you want to group, in detailed mode, click the **Options menu** button for that row, and then click **Select Row**.

b. On the Filter toolbar, select **Group AND** or **Group OR**.

c. To remove a row from a group, click the **Options menu** button for that row, and then click **Delete**.

d. To select a group, click the **Options menu** button for that group, and then click **Select Group**.

e. To add a criteria clause to a group, click the **Options menu** button for that group, click **Add Clause**, and then select the field, query relational operator, and value.

f. To unselect a group that has been previously selected, click the **Options menu** button for that group, and then click **Deselect Group**.

g. To ungroup a group, click the **Options menu** button for that group, and then click **Ungroup**.

h. To change a **Group AND** group to a **Group OR** group, or a **Group OR** group to a **Group AND** group, click the **Options menu** button for that group, and then click **Change to OR** or **Change to AND**.

- To remove a row, click the **Options menu** button for that row, and then click **Delete**. In the confirmation message, click **OK**.
- Click **Clear** to remove all criteria and start over.
- In the **Edit Filter Criteria** dialog box, click **OK**.

10. Click **Save** or **Save and Close**.
11. On the Actions toolbar, click **Publish**.
12. When the customizations are published, a confirmation message appears.

Note

If a business entity has been customized, it might have different properties than what is described in Help. There will not be Help that is specific to the custom entities your organization creates. There is Help that describes how to create and use custom entities.

Related Topics

Configuring Personal Options 197
Find Things 9

Set the default view for an entity

Can I do this task?

This task requires the System Administrator or System Customizer security role or equivalent permissions. Customization tasks can be performed only while you are online. More information: *Customization Permissions* (on page 490)

Every entity in Microsoft Dynamics CRM must have a default public view. This is the view that is displayed for a list of entities such as appointments, accounts, or contacts. For example, if your organization is set up so that users manage their own appointments, you can change the default view for **Appointments** from **All Appointments** to **My Appointments**.

You can make any public view the default public view for an entity.

1. In the Navigation Pane, click **Settings**.
2. Under **Customization**, click **Customizations**.
3. In the **Customization** area, click **Customize the System**.
4. Under **Components**, expand **Entities**, and then expand the entity you want.
5. Click **Views**.
6. In the list of views, select the **Public View** you want to set as the default. The view type is indicated in the **Type** column.
7. On the Actions toolbar, click **Actions**, and then click **Set Default**.
8. To publish view customizations for just one entity, in the Navigation Pane, click **Entities**. Then, on the Actions toolbar, click the **Publish** button.

   To publish all customizations you have made to any entities or components, on the Actions toolbar, click the **Publish All Customizations** button.

Related Topics

Customizing and Organizing Reports 95

Edit the advanced find view

Can I do this task?

This task requires the System Administrator or System Customizer security role or equivalent permissions. Customization tasks can be performed only while you are online. More information: *Customization Permissions* (on page 490)

If you edit an Advanced Find view, the changes set the default for everyone using Advanced Find for the entity. Users can change the columns for individual Advanced Find searches.

1. In the Navigation Pane, click **Settings**.
2. Under **Customization**, click **Customizations**.
3. In the **Customization** area, click **Customize the System**.
4. Under **Components**, expand **Entities**, and then expand the entity you want.
5. Click **Views**.
6. In the **Type** column, locate **Advanced Find View**. Double-click the view.
7. Modify the columns that are displayed.
   - Add a column:
     b. In the **Common Tasks** area, for Quick Find Views, click **Add View Columns**, or for other types of views, click **Add Columns**.
   i. Select the check boxes for the columns you want to add, and then click **OK**.
   - Move a column:
     a. Click the column you want to move.
   j. In the **Common Tasks** area, use the arrows to move the column left or right.
   - Change the width of a column:
     a. Click the column you want to change.
   k. In the **Common Tasks** area, click **Change Properties**.
   l. In the **Change Column Properties** dialog box, click an option to set the column width, and then click **OK**.
   - Remove a column:
     a. Click the column you want to remove.
   m. In the **Common Tasks** area, click **Remove**.
   n. In the confirmation message, click **OK**.
   - Change the sort order of a column:
     a. In the **Common Tasks** area, click **Configure Sorting**.
   o. In the **Configure Sort Order** dialog box, in the **Column** list, select the column you want to sort, then click **Ascending Order** or **Descending Order**, and then click **OK**.

- Enable online presence for instant messaging:

  a. In the **View** form for the selected entity, click the column you want to change.

p. In the **Common Tasks** area, click **Change Properties**.

q. In the **Change Column Properties** dialog box, select the **Enable Presence for this column**, and then click **OK**.

8. Edit the filter criteria for a view.

   The filter criteria is set using the same user interface as Advanced Find.

   r. Click **Edit Filter Criteria**.

      The **Edit Filter Criteria** dialog box is in Detailed mode by default.

   s. To add a criteria row:

      b. Click **Select** to specify the field to filter on.

   t. Click the query relational operator, and select an operator.

   u. Click **Enter Value**, and enter a value to filter on. For some values, you can click the **Select or change the values for this field** button to open the **Select Values** dialog box and select the value you want.

   v. To group criteria, you must select two or more rows for the same record type. For example, **Sales Stage** and **Est. Revenue** are both field values in the **Opportunity** record type and two rows that specify filter criteria for these fields can be grouped. However, rows with field values from different record types, such as **Account** and **Opportunity** record types, cannot be grouped.

      a. For each row you want to group, in detailed mode, click the **Options menu** button for that row, and then click **Select Row**.

   w. On the Filter toolbar, select **Group AND** or **Group OR**.

   x. To remove a row from a group, click the **Options menu** button for that row, and then click **Delete**.

   y. To select a group, click the **Options menu** button for that group, and then click **Select Group**.

   z. To add a criteria clause to a group, click the **Options menu** button for that group, click **Add Clause**, and then select the field, query relational operator, and value.

   aa. To unselect a group that has been previously selected, click the **Options menu** button for that group, and then click **Deselect Group**.

   bb. To ungroup a group, click the **Options menu** button for that group, and then click **Ungroup**.

   cc. To change a **Group AND** group to a **Group OR** group, or a **Group OR** group to a **Group AND** group, click the **Options menu** button for that group, and then click **Change to OR** or **Change to AND**.

   dd. To remove a row, click the **Options menu** button for that row, and then click **Delete**. In the confirmation message, click **OK**.

   ee. Click **Clear** to remove all criteria and start over.

   ff. In the **Edit Filter Criteria** dialog box, click **OK**.

9. Click **Save** or **Save and Close**.
10. To publish view customizations for just one entity, in the Navigation Pane, click **Entities**. Then, on the Actions toolbar, click the **Publish** button.

    To publish all customizations you have made to any entities or components, on the Actions toolbar, click the **Publish All Customizations** button.

    Note
    If a business entity has been customized, it might have different properties than what is described in Help. There will not be Help that is specific to the custom entities your organization creates. There is Help that describes how to create and use custom entities.

Related Topics

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Edit the filter criteria for a view

The filter criteria is set using the same user interface as Advanced Find.

1. In the **Common Tasks** pane, click **Edit Filter Criteria**.
2. To add a criteria row:
   a. Click **Select** to specify the field on which to filter.
   b. Click the query relational operator, and select an operator.
   c. Click **Enter Value**, and enter a value to filter on. For some values, you can click the **Select or change the values for this field** button to open the **Select Values** dialog box and select the value you want.
3. To group criteria, you must select two or more rows for the same record type. For example, **Sales Stage** and **Est. Revenue** are both field values in the **Opportunity** record type and two rows that specify filter criteria for these fields can be grouped. However, rows with field values from different record types, such as **Account** and **Opportunity** record types, cannot be grouped.
   a. For each row you want to group, in detailed mode, click the **Options menu** button for that row, and then click **Select Row**.
   b. On the Filter toolbar, select **Group AND** or **Group OR**.
   c. To remove a row from a group, click the **Options menu** button for that row, and then click **Delete**.
   d. To select a group, click the **Options menu** button for that group, and then click **Select Group**.
   e. To add a criteria clause to a group, click the **Options menu** button for that group, click **Add Clause**, and then select the field, query relational operator, and value.
   f. To unselect a group that has been previously selected, click the **Options menu** button for that group, and then click **Deselect Group**.

g. To ungroup a group, click the **Options menu** button for that group, and then click **Ungroup**.

h. To change a **Group AND** group to a **Group OR** group, or a **Group OR** group to a **Group AND** group, click the **Options menu** button for that group, and then click **Change to OR** or **Change to AND**.

4. To remove a row, click the **Options menu** button for that row, and then click **Delete**. In the confirmation message, click **OK**.
5. Click **Clear** to remove all criteria and start over.
6. In the **Edit Filter Criteria** dialog box, click **OK**.

Edit the lookup view

Can I do this task?

This task requires the System Administrator or System Customizer security role or equivalent permissions. Customization tasks can be performed only while you are online. More information: *Customization Permissions* (on page 490)

Each entity can have only one lookup view. The changes you make in the lookup view are displayed any time the lookup button for an entity is clicked.

1. In the Navigation Pane, click **Settings**.
2. Under **Customization**, click **Customizations**.
3. In the **Customization** area, click **Customize the System**.
4. Under **Components**, expand **Entities**, and then expand the entity you want.
5. Click **Views**.
6. In the **Type** column, locate **Lookup View**. Double-click the view.
7. Modify the columns that are displayed.

- Add a column:

i. In the **Common Tasks** area, for Quick Find Views, click **Add View Columns**, or for other types of views, click **Add Columns**.

j. Select the check boxes for the columns you want to add, and then click **OK**.

- Move a column:

a. Click the column you want to move.

k. In the **Common Tasks** area, use the arrows to move the column left or right.

- Change the width of a column:

a. Click the column you want to change.

l. In the **Common Tasks** area, click **Change Properties**.

m. In the **Change Column Properties** dialog box, click an option to set the column width, and then click **OK**.

- Remove a column:

  a. Click the column you want to remove.

n. In the **Common Tasks** area, click **Remove**.

o. In the confirmation message, click **OK**.

- Change the sort order of a column:

  a. In the **Common Tasks** area, click **Configure Sorting**.

p. In the **Configure Sort Order** dialog box, in the **Column** list, select the column you want to sort, then click **Ascending Order** or **Descending Order**, and then click **OK**.

- Enable online presence for instant messaging:

  a. In the **View** form for the selected entity, click the column you want to change.

q. In the **Common Tasks** area, click **Change Properties**.

r. In the **Change Column Properties** dialog box, select the **Enable Presence for this column**, and then click **OK**.

8. Edit the filter criteria for a view.

   The filter criteria is set using the same user interface as Advanced Find.

   s. Click **Edit Filter Criteria**.

      The **Edit Filter Criteria** dialog box is in Detailed mode by default.

   t. To add a criteria row:

      a. Click **Select** to specify the field to filter on.

   u. Click the query relational operator, and select an operator.

   v. Click **Enter Value**, and enter a value to filter on. For some values, you can click the **Select or change the values for this field** button to open the **Select Values** dialog box and select the value you want.

   w. To group criteria, you must select two or more rows for the same record type. For example, **Sales Stage** and **Est. Revenue** are both field values in the **Opportunity** record type and two rows that specify filter criteria for these fields can be grouped. However, rows with field values from different record types, such as **Account** and **Opportunity** record types, cannot be grouped.

      a. For each row you want to group, in detailed mode, click the **Options menu** button for that row, and then click **Select Row**.

   x. On the Filter toolbar, select **Group AND** or **Group OR**.

   y. To remove a row from a group, click the **Options menu** button for that row, and then click **Delete**.

   z. To select a group, click the **Options menu** button for that group, and then click **Select Group**.

   aa. To add a criteria clause to a group, click the **Options menu** button for that group, click **Add Clause**, and then select the field, query relational operator, and value.

   bb. To unselect a group that has been previously selected, click the **Options menu** button for that group, and then click **Deselect Group**.

cc. To ungroup a group, click the **Options menu** button for that group, and then click **Ungroup**.

dd. To change a **Group AND** group to a **Group OR** group, or a **Group OR** group to a **Group AND** group, click the **Options menu** button for that group, and then click **Change to OR** or **Change to AND**.

ee. To remove a row, click the **Options menu** button for that row, and then click **Delete**. In the confirmation message, click **OK**.

ff. Click **Clear** to remove all criteria and start over.

gg. In the **Edit Filter Criteria** dialog box, click **OK**.

Note

To add Find columns that are searched when users use the **Search** box in the lookup view, edit the Quick Find View. The Find columns that are specified in the Quick Find View are applicable to lookup views also. More information: *Edit a Quick Find view* (see "*Edit the Quick Find view*" on page 547)

9. Click **Save** or **Save and Close**.
10. To publish view customizations for just one entity, in the Navigation Pane, click **Entities**. Then, on the Actions toolbar, click the **Publish** button.

    To publish all customizations you have made to any entities or components, on the Actions toolbar, click the **Publish All Customizations** button.

Note

If a business entity has been customized, it might have different properties than what is described in Help. There will not be Help that is specific to the custom entities your organization creates. There is Help that describes how to create and use custom entities.

Related Topics

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Edit the associated view

Can I do this task?

This task requires the System Administrator or System Customizer security role or equivalent permissions. Customization tasks can be performed only while you are online. More information: *Customization Permissions* (on page 490)

Each entity can have only one associated view. The changes you make in the associated view are displayed in any record that links to this associated view.

An entity must have a relationship with the entity whose associated view it links to. You can add a link to a related entity in the navigation pane for an entity form. More information: Add or edit form navigation for related entities

1. In the Navigation Pane, click **Settings**.
2. Under **Customization**, click **Customizations**.
3. In the **Customization** area, click **Customize the System**.
4. Under **Components**, expand **Entities**, and then expand the entity you want.
5. Click **Views**.
6. In the **Type** column, locate **Associated View**. Double-click the view.
7. Modify the columns that are displayed.
   - Add a column:
     a. In the **Common Tasks** area, for Quick Find Views, click **Add View Columns**, or for other types of views, click **Add Columns**.

   hh. Select the check boxes for the columns you want to add, and then click **OK**.
   - Move a column:
     a. Click the column you want to move.

   ii. In the **Common Tasks** area, use the arrows to move the column left or right.
   - Change the width of a column:
     a. Click the column you want to change.

   jj. In the **Common Tasks** area, click **Change Properties**.

   kk. In the **Change Column Properties** dialog box, click an option to set the column width, and then click **OK**.
   - Remove a column:
     a. Click the column you want to remove.

   ll. In the **Common Tasks** area, click **Remove**.

   mm. In the confirmation message, click **OK**.
   - Change the sort order of a column:
     a. In the **Common Tasks** area, click **Configure Sorting**.

   nn. In the **Configure Sort Order** dialog box, in the **Column** list, select the column you want to sort, then click **Ascending Order** or **Descending Order**, and then click **OK**.
   - Enable online presence for instant messaging:
     a. In the **View** form for the selected entity, click the column you want to change.

   oo. In the **Common Tasks** area, click **Change Properties**.

   pp. In the **Change Column Properties** dialog box, select the **Enable Presence for this column**, and then click **OK**.
8. Edit the filter criteria for a view.

   The filter criteria is set using the same user interface as Advanced Find.

a. Click **Edit Filter Criteria**.

   The **Edit Filter Criteria** dialog box is in Detailed mode by default.

b. To add a criteria row:

   a. Click **Select** to specify the field to filter on.

c. Click the query relational operator, and select an operator.

d. Click **Enter Value**, and enter a value to filter on. For some values, you can click the **Select or change the values for this field** button to open the **Select Values** dialog box and select the value you want.

e. To group criteria, you must select two or more rows for the same record type. For example, **Sales Stage** and **Est. Revenue** are both field values in the **Opportunity** record type and two rows that specify filter criteria for these fields can be grouped. However, rows with field values from different record types, such as **Account** and **Opportunity** record types, cannot be grouped.

   a. For each row you want to group, in detailed mode, click the **Options menu** button for that row, and then click **Select Row**.

f. On the Filter toolbar, select **Group AND** or **Group OR**.

g. To remove a row from a group, click the **Options menu** button for that row, and then click **Delete**.

h. To select a group, click the **Options menu** button for that group, and then click **Select Group**.

i. To add a criteria clause to a group, click the **Options menu** button for that group, click **Add Clause**, and then select the field, query relational operator, and value.

j. To unselect a group that has been previously selected, click the **Options menu** button for that group, and then click **Deselect Group**.

k. To ungroup a group, click the **Options menu** button for that group, and then click **Ungroup**.

l. To change a **Group AND** group to a **Group OR** group, or a **Group OR** group to a **Group AND** group, click the **Options menu** button for that group, and then click **Change to OR** or **Change to AND**.

m. To remove a row, click the **Options menu** button for that row, and then click **Delete**. In the confirmation message, click **OK**.

n. Click **Clear** to remove all criteria and start over.

o. In the **Edit Filter Criteria** dialog box, click **OK**.

9. Click **Save** or **Save and Close**.

10. To publish view customizations for just one entity, in the Navigation Pane, click **Entities**. Then, on the Actions toolbar, click the **Publish** button.

    To publish all customizations you have made to any entities or components, on the Actions toolbar, click the **Publish All Customizations** button.

    Note
    If a business entity has been customized, it might have different properties than what is described in Help. There will not be Help that is specific to the custom entities your organization creates. There is Help that describes how to create and use custom entities.

Related Topics

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Delete a view

Can I do this task?

This task requires the System Administrator or System Customizer security role or equivalent permissions. Customization tasks can be performed only while you are online. More information: *Customization Permissions* (on page 490)

You can only delete a custom public view that has been added to an entity. You cannot delete any public view that was created as part of a business entity or a custom entity. If a custom public view is part of a managed solution that was installed, you cannot delete it. However, if the public view was added to a managed solution entity after installation, that public view can be deleted.

In addition, you cannot delete the associated view, the Advanced Find view, the Quick Find view, or the lookup view.

1. In the Navigation Pane, click **Settings**.
2. Under **Customization**, click **Customizations**.
3. In the **Customization** area, click **Customize the System**.
4. Under **Components**, expand **Entities**, and then expand the entity you want.
5. Click **Views**.
6. In the **Type** column, locate a custom view that is a **Public View**.
7. On the Actions toolbar, click the **Delete** button .
8. To finish deleting the view from the Microsoft Dynamics CRM system, you must publish it.
9. To publish view customizations for just one entity, in the Navigation Pane, click **Entities**. Then, on the Actions toolbar, click the **Publish** button.

   To publish all customizations you have made to any entities or components, on the Actions toolbar, click the **Publish All Customizations** button.

Related Topics

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Understanding entity forms

Forms are pages that display detailed information users have entered, such as information about a contact. The information entered in a form about a specific item is stored as a record.

A new form created for an entity has the form type of **Main**. When first opened, it is identical to the form named **Information**. More information: *Create a new form for an entity* (on page 568)

A form can be based on an existing form. More information: Create a new form based on an existing form

Understanding entity security

You have to have the System Administrator or System Customizer security role to access customization features, which includes most tasks in this topic. The differences in the roles are:

- System Administrator. This role includes privileges to view or modify data in the system.
- System Customizer. This role excludes privileges to view or modify data in the system.

More information: *Permissions required for customization* (see "*Permissions required for customization tasks*" on page 490)

Edit the main form for an entity

Can I do this task?

This task requires the System Administrator or System Customizer security role or equivalent permissions. Customization tasks can be performed only while you are online. More information: *Customization Permissions* (on page 490)

This procedure works for any form with a **Form Type** of **Main**. Each main form is comprised of one or more *tabs*. Each tab can have one or more *sections*. Each section contains one or more *fields* or IFRAMES.

1. In the Navigation Pane, click **Settings**.
2. Under **Customization**, click **Customizations**.
3. In the **Customization** area, click **Customize the System**.
4. Under **Components**, expand **Entities**, and then expand the entity you want.
5. Click **Forms**.

   To create a new form, in the main pane on the Actions toolbar, click the **New** button.

   - OR -

   To edit an existing form, double-click any form with a **Form Type** of **Main**.
6. Make any of the following design changes, as needed:

   Add a tab to a form

   7. In the Navigation Pane, click **Settings**.

8. Under **Customization**, click **Customizations**.
9. In the **Customization** area, click **Customize the System**.
10. Under **Components**, expand **Entities**, and then expand the entity you want.
11. Click **Forms**. In the list, click a form to edit it if it has a **Form Type** of **Main**.
12. On the **Insert** tab, click either **One Column** or **Two Columns**.
13. Click the tab you would like to edit. Then, on the **Home** tab, click **Change Properties**. The **Tab Properties** dialog box opens.
14. On the **Display** tab, enter a unique name in **Name**.
15. On the **Formatting** tab, specify whether you would like the tab to have one or two columns.
16. On the **Events** tab, you can add and edit form libraries and the TabStateChange event, which indicates when the tab is expanded or collapsed. More information: *Add or edit event scripts for fields and forms* (on page 532)
17. Click **OK**.
18. When you finish editing the form, click **Save and Close** to close the form.
19. You can preview how the main form will appear and how events will function:
    b. On the **Home** tab, click **Preview**, and then select **Create Form**, **Update Form**, or **Read-Only Form**.
p. To close the **Preview** form, on the **File** menu, click **Close**.
20. When your customizations are complete, publish them:
    - To publish customizations for only the component that you are currently editing, on the **Home** tab, in the **Save** group, click **Publish**.
    - To publish customizations for all unpublished components at one time, click **Publish All Customizations**.

Add a section to a form

1. Click the tab area where you would like to add a section.
2. On the **Insert** tab, in the **Section** group, click **One Column**, **Two Columns**, **Three Columns**, or **Four Columns**.

   The new section is added to the bottom of the tab. You can edit its properties.
3. Click the section that you want to edit. Then, on the **Home** tab in the **Edit** group, click **Change Properties**.
4. In the **Section Properties** dialog box, on the **Display** tab:
   a. Enter a unique name in **Name**.
q. In the **Width** text box, set the width of the label area for the fields in the section.
r. Select the **Visible by default** check box if you want to display the field. If you clear this check box, the field does not display in the **Reading Pane** in Microsoft Dynamics CRM for Microsoft Office

Outlook. The field displays in the Microsoft Dynamics CRM web application unless you use JScript to define other behavior. In the web application, JScript overrides this check box.

5. On the **Formatting** tab, click the option for the number of columns you want. Also, click the options for field label alignment and field label position.
6. Click **OK**.

Add a field to a form

To add a new field, in the **Common Tasks** area, click **Add Fields** .

In the **Add Fields** dialog box, select the fields you want to add to the form, and then click **OK**.

Add or edit an IFRAME

Caution: Because applications can interact with each other through an IFRAME, by default, in the **Security** section, the **Restrict cross-frame scripting** check box is selected. Remove this restriction only if you are sure the site you are using as the target of the IFRAME can be trusted.

a. To add an IFRAME, in the **Common Tasks** area, click **Add an IFRAME**.

   - OR -

   Select a tab and then the IFRAME in the tab you want to edit, and then in the **Common Tasks** area, click **Change Properties**.

b. On the **Add an IFRAME** or **IFRAME Properties** dialog box, on the **General** tab, enter the information you want. In particular, note the following:

   - In the **Name** box, enter a unique name for the IFRAME. The name can only contain alphanumeric characters and underscore.
   - In the **URL** box, enter a full URL for the IFRAME, and optionally select the **Pass record object-type code and unique identifier as parameters** check box. More information: *Passing IFRAME parameters (Microsoft Dynamics CRM SDK)* (see Passing IFRAME parameters (Microsoft Dynamics CRM SDK) - http://go.microsoft.com/fwlink/?LinkId=201317)
   - The **Restrict cross-frame scripting** check box is selected by default for security purposes. Exercise great caution in allowing cross-frame scripting.

c. On the **Formatting** tab, the formatting options displayed depend on the section formatting options. If the section formatting is defined as **Variable Field Width**, you can choose a layout of one or two columns and set the field to automatically expand to use available space. In either case, you can determine the scrolling type, whether a border is displayed and the number of rows for the field.

d. On the **Dependencies** tab, from the **Available fields** list, select the fields you want to designate as dependent fields in the IFRAME, and then click the **Add Selected Records** button to move the selected fields to the **Dependent fields** list.

e. Click **OK**.

Add or edit a sub-grid

1. To add a sub-grid, on the **Insert** tab, click the **Sub-Grid** button.

   - OR -

To edit an existing sub-grid, click it, and then on the **Home** tab, in the **Edit** group, click the **Change Properties** button.

2. In the **Sub-Grid Properties** dialog box, on the **Display** tab, pay particular attention to the following fields:

   b. In the **Name** text box, enter a unique name. This can only contain alphanumeric characters and underscore.

f. In the **Data Source** section, use the **Entity** and **Default View** lists to specify the group of records that you want displayed in the sub-grid.

g. If you want to edit the view that you selected, click **Edit**. To create a new view, click **New**. More information: *Create or edit a system view for an entity*

3. On the **Formatting** tab, click the options for the number of columns and rows to display in the sub-grid.
4. Click **OK**.

Add or edit a web resource

You can add a Web resource that is an image, an HTML file, a Silverlight control, or a JScript library.

1. To add a Web resource, click the tab in which you'd like to insert it, and then on the **Insert** tab, click **Web Resource**.

   - OR -

   To edit a Web resource, select a tab and the Web resource that you want to edit, and then on the **Home** tab, click **Change Properties**.

2. In the **Add Web Resource** or **Web Resource Properties** dialog box, on the **General** tab, enter the information you want. In particular, note the following:
   - In the **Web Resource** box, select the image, HTML, Silverlight, or JScript library Web resource that you want.
   - In the **Name** box, enter a unique name for the field. The name can contain only alphanumeric characters and underscores.
   - After you add a Web resource, the **Web Resource Properties** section appears on this tab. It has options to set custom parameters or pass a record object-type code as a parameter.
3. On the **Formatting** tab, that options that are displayed depend on the section formatting options. In any case, you can determine the number of rows for the field, whether a border is displayed, and the scrolling type.
4. On the **Dependencies** tab, from the **Available fields** list, select the fields that are required by the Web resource, and then click the **Add Selected Records** button >> to move the selected fields to the **Dependent fields** list.
5. Click **OK**.

Add or edit form navigation for related entities

1. To add a link to a related entity, on **Home** tab, in the **Select** group, click **Navigation**. **Relationship Explorer** opens on the right side of the form editor.

2. In the **Relationship Explorer** list, select the related entity you want, drag it to the Navigation Pane, and drop it where you want it to be displayed.

   Tip: You can also create a new relationship by clicking the **New 1:N** or **New N:N** buttons at the bottom of **Relationship Explorer**. More information: *Create, edit, or view 1:N relationships between entities* (see "*Create or edit 1:N relationships between entities*" on page 593), *Create or edit N:N relationships between entities* (on page 600)

3. To edit the properties for this or any other related entity link in the Navigation Pane, select the link, and then on the **Home** tab, click **Change Properties**.
4. In the **Relationship Properties** dialog box, on the **Display** tab, type a new display label.
5. On the **Name** tab, you can view details about the entity relationship for this link. Click the **Edit** button to view or edit the relationship record. More information: *Create, edit, or view 1:N relationships between entities* (see "*Create or edit 1:N relationships between entities*" on page 593), *Create or edit N:N relationships between entities* (on page 600)
6. Click **OK**.

Edit form headers and footers

1. On the **Home** tab, in the **Select** group, click **Header** or **Footer**.
2. To edit the properties, on the **Home** tab, in the **Edit** group, click **Change Properties**.

   The **Header Properties** or the **Footer Properties** dialog box opens.

3. On the **Display** tab, specify the width of the field label.
4. On the **Formatting** tab, specify the number of columns you want in the header or footer. You can also specify field label alignment.
5. Click **OK**.
6. To add fields to the header or footer, in **Field Explorer**, select a field and drag it to the spot in which you want it to display.

Remove a tab, section, field, or IFRAME

1. On the **Home** tab, in the **Select** group, click **Body**.
2. Select the tab, section, field, or IFRAME that you want to remove.

   Note: If a section or field is locked by default, it cannot be removed. If you have locked the section or field, you must unlock it before removing it. More information: Edit form field properties, *Edit a section* (see "*Edit section properties*" on page 586)

3. On the **Home** tab, in the **Edit** group, click **Remove**.
4. In the confirmation message, click **OK**.

Enable or disable the Form Assistant

1. In the Navigation Pane, click **Service**, and then click **Cases**.
2. On the **Customize** tab, in the **Design** group, click **Form**.
3. On the **Home** tab, in the **Form** group, click **Form Properties**.
4. In the **Form Properties** dialog box, click the **Display** tab.

5. In the **Form Assistant** section, select or clear the **Expanded by default** check box.

7. Edit the properties for parts of the form, as needed:

Edit form properties

6. On the **Home** tab, in the **Form** group, click **Form Properties**.
7. In the **Form Properties** dialog box, some of the properties you can edit include:
   - On the **Display** tab, in the **Form Name** box, edit the name that is displayed for the form.
   - In the **Page Navigation** section, select the check box if you want the form to display the page navigation.
   - On the **Non-Event Dependencies** tab, select the form fields that are required for any external, non-event scripts. These fields will not be removable from the form.
   - On the **Events** tab, you can do the following:
     - In the **Form Libraries** section, add or remove the JScript libraries that will be available for form or field events. You can also edit the libraries.
     - In the **Event Handlers** section, you can create a script that is executed when data in the form changes.

       ii. Click **Add** to add a new script, or click **Edit** to edit an existing script.

       In the **Handler Properties** dialog box, supply the requested information. Select the **Enabled** check box to make the function available to be called by a field event.

       Click **OK**.

       More information: *Add or edit event scripts for fields and forms* (on page 532)
8. Click **OK**.

Edit form field properties

1. To add a new field, in the **Common Tasks** area, click **Add Fields**. In the **Add Fields** dialog box, select the fields you want to add to the form, and optionally, from the **Tab** and **Section** lists, select the tab and section in which you want to place the selected field or fields, and then click **OK**.
2. To edit a field, select the field you want to edit, and then in the **Common Tasks** area, click **Change Properties**.
3. In the **Field Properties** dialog box, edit a field as follows:
   - On the **Display** tab you can edit the following:
     - Change the label used for this field. This will not change the attribute display name, just the text in this form.
     - If necessary, select the **Display label on the form** check box to make the label visible on the form. Clear the check box if you want to have a field with no label, for example, if the field is the only one in a section with a clearly descriptive name.
     - Select **Disabled on the form** to make the field read-only for example, if the field displays a value calculated by a client-side script.
     - In the **Location** area, select the tab and section to which you want to move the field.

- In the **Locking** area, specify whether you wish to lock the field to the form by selecting **Lock the field on the form**. This will prevent anyone from removing this field using the **Remove** command from the **Common Tasks** area. This will also protect the tab and section that contain this field from being removed.

- On the **Formatting** tab, the formatting options displayed depend on the section formatting options. If the section formatting is defined as **Variable Field Width**, you can choose a layout of one or two columns and set the field to automatically expand to use available space. If the form formatting is defined as **Fixed Field Width**, you do not have the option of modifying the number of columns, but for **ntext** fields, you can define the number of rows for the field. For **bit** fields, you can set the formatting to Two radio buttons, Checkbox, or List.
- On the **Schema** tab, the fields are read-only by default, and cannot be changed in the form for the entity.
- On the **Events** tab, you can create a script that is executed when data in the field is changed:

  In the **Event List** box, select **onChange**, and then click **Edit**.

  In the **Handler Properties** dialog box, supply the requested information. Select the **Enabled** check box to make the function available to be called by a field event.

  On the **Non-Event Dependencies** tab, in the **Available fields** list, select any fields you have referenced in scripts, and then click the **Add Selected Records** button >> to move the selected fields to the **Dependent fields** list.

  - OR -

  From the **Dependent fields** list, select the fields you want to remove as dependent fields, then click the **Remove Selected Records** button << to move the selected fields to the **Available fields** list.

  Click **OK**.

4. Click **OK**.

Edit tab properties

1. Click the tab you would like to edit. Then, on the **Home** tab, click **Change Properties**. The **Tab Properties** dialog box opens.
2. On the **Display** tab, enter a unique name in **Name**.
3. On the **Formatting** tab, specify whether you would like the tab to have one or two columns.
4. On the **Events** tab, you can add and edit form libraries and the TabStateChange event, which indicates when the tab is expanded or collapsed. More information: *Add or edit event scripts for fields and forms* (on page 532)
5. Click **OK**.

Edit section properties

1. Click the section that you want to edit. Then, on the **Home** tab in the **Edit** group, click **Change Properties**.
2. In the **Section Properties** dialog box, on the **Display** tab:

a. Enter a unique name in **Name**.

h. In the **Width** text box, set the width of the label area for the fields in the section.

i. Select the **Visible by default** check box if you want to display the field. If you clear this check box, the field does not display in the **Reading Pane** in Microsoft Dynamics CRM for Microsoft Office Outlook. The field displays in the Microsoft Dynamics CRM web application unless you use JScript to define other behavior. In the web application, JScript overrides this check box.

3. On the **Formatting** tab, click the option for the number of columns you want. Also, click the options for field label alignment and field label position.

4. Click **OK**.

8. Add event scripts, as needed. More information: *Add or edit event scripts for fields and forms* (on page 532)

9. Determine which security roles will be able to view the form:

Assign a security role to a form

1. On the **Home** tab, in the **Form** group, click **Assign Roles**.
2. In the **Assign Roles** dialog box, select the security roles to which this form will be available. More information: Controlling Data Access
3. To make this the fallback form, select the **Enabled for fallback** check box.
4. At least one form per entity must be a fallback form, the form that is displayed to a user when no other form is available for that user's security role.
5. Click **OK**.

10. Preview how the main form appears and how events functions:

a. On the **Home** tab, click **Preview**, and then select **Create Form**, **Update Form**, or **Read-Only Form**.

b. To close the **Preview** form, on the **File** menu, click **Close**.

11. When you finish editing the form, click **Save As**. Enter a name for the form, and then click **OK**.

12. When your customizations are complete, publish them:

- To publish customizations for only the component that you are currently editing, on the **Home** tab, in the **Save** group, click **Publish**.
- To publish customizations for all unpublished components at one time, click **Publish All Customizations**.

Notes

- You can not apply a requirement level to a field using this form. Requirement level constraints are applied to the attribute.
- Before deleting a field from a form, make sure the field is not required by other components or custom scripts. For example, the Opportunity form requires the Price List field to determine the pricing to use when adding a product to that opportunity. Removing the Price List field would prevent adding a new product to an opportunity.

- Any time you change user interface elements or implement form scripts for an entity, you must publish changes to apply them. Any customizations that change the data schema of Microsoft Dynamics CRM such as custom entities, relationships, or fields are applied immediately.
- You cannot modify the visual style of forms, such as the font style, font size, or colors used in the form using the form editor. Modification of the Cascading Style Sheets (CSS) pages in the Web application or style properties of the form through scripts is not supported.

Related Topics

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Create a new form for an entity

When you create a new form for an entity, its form type is **Main**. When the new form opens, it is identical to the form named **Information**. You can add or edit fields, sections, tabs, and navigation, and properties associated with the form, and then save it with a new name.

If you want to base your new form on a different form rather than the one named **Information**, you can clone a form. More information: Create a new form based on an existing form

➢ Create a new form

1. In the Navigation Pane, click **Settings**.
2. Under **Customization**, click **Customizations**.
3. In the **Customization** area, click **Customize the System**.
4. Under **Components**, expand **Entities**, and then expand the entity you want.
5. Click **Forms**.

   To create a new form, in the main pane on the Actions toolbar, click the **New** button.

   - OR -

   To edit an existing form, double-click any form with a **Form Type** of **Main**.
6. Make any of the following design changes, as needed:

   Add a tab to a form

   1. In the Navigation Pane, click **Settings**.
   2. Under **Customization**, click **Customizations**.
   3. In the **Customization** area, click **Customize the System**.
   4. Under **Components**, expand **Entities**, and then expand the entity you want.
   5. Click **Forms**. In the list, click a form to edit it if it has a **Form Type** of **Main**.
   6. On the **Insert** tab, click either **One Column** or **Two Columns**.

7. Click the tab you would like to edit. Then, on the **Home** tab, click **Change Properties**. The **Tab Properties** dialog box opens.
8. On the **Display** tab, enter a unique name in **Name**.
9. On the **Formatting** tab, specify whether you would like the tab to have one or two columns.
10. On the **Events** tab, you can add and edit form libraries and the TabStateChange event, which indicates when the tab is expanded or collapsed. More information: *Add or edit event scripts for fields and forms* (on page 532)
11. Click **OK**.
12. When you finish editing the form, click **Save and Close** to close the form.
13. You can preview how the main form will appear and how events will function:
    a. On the **Home** tab, click **Preview**, and then select **Create Form**, **Update Form**, or **Read-Only Form**.
c. To close the **Preview** form, on the **File** menu, click **Close**.
14. When your customizations are complete, publish them:
    - To publish customizations for only the component that you are currently editing, on the **Home** tab, in the **Save** group, click **Publish**.
    - To publish customizations for all unpublished components at one time, click **Publish All Customizations**.

Add a section to a form

1. Click the tab area where you would like to add a section.
2. On the **Insert** tab, in the **Section** group, click **One Column**, **Two Columns**, **Three Columns**, or **Four Columns**.

   The new section is added to the bottom of the tab. You can edit its properties.
3. Click the section that you want to edit. Then, on the **Home** tab in the **Edit** group, click **Change Properties**.
4. In the **Section Properties** dialog box, on the **Display** tab:
   b. Enter a unique name in **Name**.
d. In the **Width** text box, set the width of the label area for the fields in the section.
e. Select the **Visible by default** check box if you want to display the field. If you clear this check box, the field does not display in the **Reading Pane** in Microsoft Dynamics CRM for Microsoft Office Outlook. The field displays in the Microsoft Dynamics CRM web application unless you use JScript to define other behavior. In the web application, JScript overrides this check box.
5. On the **Formatting** tab, click the option for the number of columns you want. Also, click the options for field label alignment and field label position.
6. Click **OK**.

Add a field to a form

To add a new field, in the **Common Tasks** area, click **Add Fields** .

In the **Add Fields** dialog box, select the fields you want to add to the form, and then click **OK**.

Add or edit an IFRAME

Caution: Because applications can interact with each other through an IFRAME, by default, in the **Security** section, the **Restrict cross-frame scripting** check box is selected. Remove this restriction only if you are sure the site you are using as the target of the IFRAME can be trusted.

f. To add an IFRAME, in the **Common Tasks** area, click **Add an IFRAME**.

- OR -

Select a tab and then the IFRAME in the tab you want to edit, and then in the **Common Tasks** area, click **Change Properties**.

g. On the **Add an IFRAME** or **IFRAME Properties** dialog box, on the **General** tab, enter the information you want. In particular, note the following:

- In the **Name** box, enter a unique name for the IFRAME. The name can only contain alphanumeric characters and underscore.
- In the **URL** box, enter a full URL for the IFRAME, and optionally select the **Pass record object-type code and unique identifier as parameters** check box. More information: *Passing IFRAME parameters (Microsoft Dynamics CRM SDK)* (see Passing IFRAME parameters (Microsoft Dynamics CRM SDK) - http://go.microsoft.com/fwlink/?LinkId=201317)
- The **Restrict cross-frame scripting** check box is selected by default for security purposes. Exercise great caution in allowing cross-frame scripting.

h. On the **Formatting** tab, the formatting options displayed depend on the section formatting options. If the section formatting is defined as **Variable Field Width**, you can choose a layout of one or two columns and set the field to automatically expand to use available space. In either case, you can determine the scrolling type, whether a border is displayed and the number of rows for the field.

i. On the **Dependencies** tab, from the **Available fields** list, select the fields you want to designate as dependent fields in the IFRAME, and then click the **Add Selected Records** button to move the selected fields to the **Dependent fields** list.

j. Click **OK**.

Add or edit a sub-grid

1. To add a sub-grid, on the **Insert** tab, click the **Sub-Grid** button.

- OR -

To edit an existing sub-grid, click it, and then on the **Home** tab, in the **Edit** group, click the **Change Properties** button.

2. In the **Sub-Grid Properties** dialog box, on the **Display** tab, pay particular attention to the following fields:

c. In the **Name** text box, enter a unique name. This can only contain alphanumeric characters and underscore.

k. In the **Data Source** section, use the **Entity** and **Default View** lists to specify the group of records that you want displayed in the sub-grid.

l. If you want to edit the view that you selected, click **Edit**. To create a new view, click **New**. More information: *Create or edit a system view for an entity*

3. On the **Formatting** tab, click the options for the number of columns and rows to display in the sub-grid.
4. Click **OK**.

Add or edit a web resource

You can add a Web resource that is an image, an HTML file, a Silverlight control, or a JScript library.

1. To add a Web resource, click the tab in which you'd like to insert it, and then on the **Insert** tab, click **Web Resource**.

   - OR -

   To edit a Web resource, select a tab and the Web resource that you want to edit, and then on the **Home** tab, click **Change Properties**.
2. In the **Add Web Resource** or **Web Resource Properties** dialog box, on the **General** tab, enter the information you want. In particular, note the following:
   - In the **Web Resource** box, select the image, HTML, Silverlight, or JScript library Web resource that you want.
   - In the **Name** box, enter a unique name for the field. The name can contain only alphanumeric characters and underscores.
   - After you add a Web resource, the **Web Resource Properties** section appears on this tab. It has options to set custom parameters or pass a record object-type code as a parameter.
3. On the **Formatting** tab, that options that are displayed depend on the section formatting options. In any case, you can determine the number of rows for the field, whether a border is displayed, and the scrolling type.
4. On the **Dependencies** tab, from the **Available fields** list, select the fields that are required by the Web resource, and then click the **Add Selected Records** button to move the selected fields to the **Dependent fields** list.
5. Click **OK**.

Add or edit form navigation for related entities

6. To add a link to a related entity, on **Home** tab, in the **Select** group, click **Navigation**. **Relationship Explorer** opens on the right side of the form editor.
7. In the **Relationship Explorer** list, select the related entity you want, drag it to the Navigation Pane, and drop it where you want it to be displayed.

   Tip: You can also create a new relationship by clicking the **New 1:N** or **New N:N** buttons at the bottom of **Relationship Explorer**. More information: *Create, edit, or view 1:N relationships between entities* (see "*Create or edit 1:N relationships between entities*" on page 593), *Create or edit N:N relationships between entities* (on page 600)
8. To edit the properties for this or any other related entity link in the Navigation Pane, select the link, and then on the **Home** tab, click **Change Properties**.

9. In the **Relationship Properties** dialog box, on the **Display** tab, type a new display label.
10. On the **Name** tab, you can view details about the entity relationship for this link. Click the **Edit** button to view or edit the relationship record. More information: *Create, edit, or view 1:N relationships between entities* (see "*Create or edit 1:N relationships between entities*" on page 593), *Create or edit N:N relationships between entities* (on page 600)
11. Click **OK**.

Edit form headers and footers

1. On the **Home** tab, in the **Select** group, click **Header** or **Footer**.
2. To edit the properties, on the **Home** tab, in the **Edit** group, click **Change Properties**.

   The **Header Properties** or the **Footer Properties** dialog box opens.
3. On the **Display** tab, specify the width of the field label.
4. On the **Formatting** tab, specify the number of columns you want in the header or footer. You can also specify field label alignment.
5. Click **OK**.
6. To add fields to the header or footer, in **Field Explorer**, select a field and drag it to the spot in which you want it to display.

Remove a tab, section, field, or IFRAME

1. On the **Home** tab, in the **Select** group, click **Body**.
2. Select the tab, section, field, or IFRAME that you want to remove.

   Note: If a section or field is locked by default, it cannot be removed. If you have locked the section or field, you must unlock it before removing it. More information: Edit form field properties, *Edit a section* (see "*Edit section properties*" on page 586)
3. On the **Home** tab, in the **Edit** group, click **Remove**.
4. In the confirmation message, click **OK**.

Enable or disable the Form Assistant

1. In the Navigation Pane, click **Service**, and then click **Cases**.
2. On the **Customize** tab, in the **Design** group, click **Form**.
3. On the **Home** tab, in the **Form** group, click **Form Properties**.
4. In the **Form Properties** dialog box, click the **Display** tab.
5. In the **Form Assistant** section, select or clear the **Expanded by default** check box.

7. Edit the properties for parts of the form, as needed:

Edit form properties

6. On the **Home** tab, in the **Form** group, click **Form Properties**.
7. In the **Form Properties** dialog box, some of the properties you can edit include:
   - On the **Display** tab, in the **Form Name** box, edit the name that is displayed for the form.

- In the **Page Navigation** section, select the check box if you want the form to display the page navigation.
- On the **Non-Event Dependencies** tab, select the form fields that are required for any external, non-event scripts. These fields will not be removable from the form.
- On the **Events** tab, you can do the following:
  - In the **Form Libraries** section, add or remove the JScript libraries that will be available for form or field events. You can also edit the libraries.
  - In the **Event Handlers** section, you can create a script that is executed when data in the form changes.

    iii. Click **Add** to add a new script, or click **Edit** to edit an existing script.

    In the **Handler Properties** dialog box, supply the requested information. Select the **Enabled** check box to make the function available to be called by a field event.

    Click **OK**.

    More information: *Add or edit event scripts for fields and forms* (on page 532)

8. Click **OK**.

Edit form field properties

9. To add a new field, in the **Common Tasks** area, click **Add Fields**. In the **Add Fields** dialog box, select the fields you want to add to the form, and optionally, from the **Tab** and **Section** lists, select the tab and section in which you want to place the selected field or fields, and then click **OK**.
10. To edit a field, select the field you want to edit, and then in the **Common Tasks** area, click **Change Properties**.
11. In the **Field Properties** dialog box, edit a field as follows:
    - On the **Display** tab you can edit the following:
      - Change the label used for this field. This will not change the attribute display name, just the text in this form.
      - If necessary, select the **Display label on the form** check box to make the label visible on the form. Clear the check box if you want to have a field with no label, for example, if the field is the only one in a section with a clearly descriptive name.
      - Select **Disabled on the form** to make the field read-only for example, if the field displays a value calculated by a client-side script.
      - In the **Location** area, select the tab and section to which you want to move the field.
      - In the **Locking** area, specify whether you wish to lock the field to the form by selecting **Lock the field on the form**. This will prevent anyone from removing this field using the **Remove** command from the **Common Tasks** area. This will also protect the tab and section that contain this field from being removed.
    - On the **Formatting** tab, the formatting options displayed depend on the section formatting options. If the section formatting is defined as **Variable Field Width**, you can choose a layout of one or two columns and set the field to automatically expand to use available space. If the form formatting is

defined as **Fixed Field Width**, you do not have the option of modifying the number of columns, but for **ntext** fields, you can define the number of rows for the field. For **bit** fields, you can set the formatting to Two radio buttons, Checkbox, or List.

- On the **Schema** tab, the fields are read-only by default, and cannot be changed in the form for the entity.
- On the **Events** tab, you can create a script that is executed when data in the field is changed:

i. In the **Event List** box, select **onChange**, and then click **Edit**.

In the **Handler Properties** dialog box, supply the requested information. Select the **Enabled** check box to make the function available to be called by a field event.

On the **Non-Event Dependencies** tab, in the **Available fields** list, select any fields you have referenced in scripts, and then click the **Add Selected Records** button to move the selected fields to the **Dependent fields** list.

- OR -

From the **Dependent fields** list, select the fields you want to remove as dependent fields, then click the **Remove Selected Records** button to move the selected fields to the **Available fields** list.

Click **OK**.

12. Click **OK**.

Edit tab properties

13. Click the tab you would like to edit. Then, on the **Home** tab, click **Change Properties**. The **Tab Properties** dialog box opens.
14. On the **Display** tab, enter a unique name in **Name**.
15. On the **Formatting** tab, specify whether you would like the tab to have one or two columns.
16. On the **Events** tab, you can add and edit form libraries and the TabStateChange event, which indicates when the tab is expanded or collapsed. More information: *Add or edit event scripts for fields and forms* (on page 532)
17. Click **OK**.

Edit section properties

1. Click the section that you want to edit. Then, on the **Home** tab in the **Edit** group, click **Change Properties**.
2. In the **Section Properties** dialog box, on the **Display** tab:

m. Enter a unique name in **Name**.

n. In the **Width** text box, set the width of the label area for the fields in the section.

o. Select the **Visible by default** check box if you want to display the field. If you clear this check box, the field does not display in the **Reading Pane** in Microsoft Dynamics CRM for Microsoft Office Outlook. The field displays in the Microsoft Dynamics CRM web application unless you use JScript to define other behavior. In the web application, JScript overrides this check box.

3. On the **Formatting** tab, click the option for the number of columns you want. Also, click the options for field label alignment and field label position.
4. Click **OK**.

8. Add event scripts, as needed. More information: *Add or edit event scripts for fields and forms* (on page 532)
9. Determine which security roles will be able to view the form:

   Assign a security role to a form

   1. On the **Home** tab, in the **Form** group, click **Assign Roles**.
   2. In the **Assign Roles** dialog box, select the security roles to which this form will be available. More information: Controlling Data Access
   3. To make this the fallback form, select the **Enabled for fallback** check box.

      At least one form per entity must be a fallback form, the form that is displayed to a user when no other form is available for that user's security role.
   4. Click **OK**.
10. Preview how the main form appears and how events functions:
    a. On the **Home** tab, click **Preview**, and then select **Create Form**, **Update Form**, or **Read-Only Form**.
    b. To close the **Preview** form, on the **File** menu, click **Close**.
11. When you finish editing the form, click **Save As**. Enter a name for the form, and then click **OK**.
12. When your customizations are complete, publish them:
    - To publish customizations for only the component that you are currently editing, on the **Home** tab, in the **Save** group, click **Publish**.
    - To publish customizations for all unpublished components at one time, click **Publish All Customizations**.

    Notes
    - You can not apply a requirement level to a field using this form. Requirement level constraints are applied to the attribute.
    - Before deleting a field from a form, make sure the field is not required by other components or custom scripts. For example, the Opportunity form requires the Price List field to determine the pricing to use when adding a product to that opportunity. Removing the Price List field would prevent adding a new product to an opportunity.
    - Any time you change user interface elements or implement form scripts for an entity, you must publish changes to apply them. Any customizations that change the data schema of Microsoft Dynamics CRM such as custom entities, relationships, or fields are applied immediately.
    - You cannot modify the visual style of forms, such as the font style, font size, or colors used in the form using the form editor. Modification of the Cascading Style Sheets (CSS) pages in the Web application or style properties of the form through scripts is not supported.

Create a new form based on an existing form

1. In the Navigation Pane, click **Settings**.
2. Under **Customization**, click **Customizations**.
3. In the **Customization** area, click **Customize the System**.
4. Under **Components**, expand **Entities**, and then expand the entity you want.
5. Click **Forms**. In the main pane, double-click any form with a **Form Type** of **Main**.

Add a tab to a form

1. In the Navigation Pane, click **Settings**.
2. Under **Customization**, click **Customizations**.
3. In the **Customization** area, click **Customize the System**.
4. Under **Components**, expand **Entities**, and then expand the entity you want.
5. Click **Forms**. In the list, click a form to edit it if it has a **Form Type** of **Main**.
6. On the **Insert** tab, click either **One Column** or **Two Columns**.
7. Click the tab you would like to edit. Then, on the **Home** tab, click **Change Properties**. The **Tab Properties** dialog box opens.
8. On the **Display** tab, enter a unique name in **Name**.
9. On the **Formatting** tab, specify whether you would like the tab to have one or two columns.
10. On the **Events** tab, you can add and edit form libraries and the TabStateChange event, which indicates when the tab is expanded or collapsed. More information: *Add or edit event scripts for fields and forms* (on page 532)
11. Click **OK**.
12. When you finish editing the form, click **Save and Close** to close the form.
13. You can preview how the main form will appear and how events will function:

    d. On the **Home** tab, click **Preview**, and then select **Create Form**, **Update Form**, or **Read-Only Form**.

    c. To close the **Preview** form, on the **File** menu, click **Close**.

14. When your customizations are complete, publish them:
    - To publish customizations for only the component that you are currently editing, on the **Home** tab, in the **Save** group, click **Publish**.
    - To publish customizations for all unpublished components at one time, click **Publish All Customizations**.

Add a section to a form

1. Click the tab area where you would like to add a section.

2. On the **Insert** tab, in the **Section** group, click **One Column**, **Two Columns**, **Three Columns**, or **Four Columns**.

   The new section is added to the bottom of the tab. You can edit its properties.

3. Click the section that you want to edit. Then, on the **Home** tab in the **Edit** group, click **Change Properties**.

4. In the **Section Properties** dialog box, on the **Display** tab:

   a. Enter a unique name in **Name**.

d. In the **Width** text box, set the width of the label area for the fields in the section.

e. Select the **Visible by default** check box if you want to display the field. If you clear this check box, the field does not display in the **Reading Pane** in Microsoft Dynamics CRM for Microsoft Office Outlook. The field displays in the Microsoft Dynamics CRM web application unless you use JScript to define other behavior. In the web application, JScript overrides this check box.

5. On the **Formatting** tab, click the option for the number of columns you want. Also, click the options for field label alignment and field label position.

6. Click **OK**.

Add a field to a form

To add a new field, in the **Common Tasks** area, click **Add Fields** .

In the **Add Fields** dialog box, select the fields you want to add to the form, and then click **OK**.

Add or edit an IFRAME

Caution: Because applications can interact with each other through an IFRAME, by default, in the **Security** section, the **Restrict cross-frame scripting** check box is selected. Remove this restriction only if you are sure the site you are using as the target of the IFRAME can be trusted.

a. To add an IFRAME, in the **Common Tasks** area, click **Add an IFRAME**.

   - OR -

   Select a tab and then the IFRAME in the tab you want to edit, and then in the **Common Tasks** area, click **Change Properties**.

b. On the **Add an IFRAME** or **IFRAME Properties** dialog box, on the **General** tab, enter the information you want. In particular, note the following:

   - In the **Name** box, enter a unique name for the IFRAME. The name can only contain alphanumeric characters and underscore.
   - In the **URL** box, enter a full URL for the IFRAME, and optionally select the **Pass record object-type code and unique identifier as parameters** check box. More information: *Passing IFRAME parameters (Microsoft Dynamics CRM SDK)* (see Passing IFRAME parameters (Microsoft Dynamics CRM SDK) - http://go.microsoft.com/fwlink/?LinkId=201317)
   - The **Restrict cross-frame scripting** check box is selected by default for security purposes. Exercise great caution in allowing cross-frame scripting.

c. On the **Formatting** tab, the formatting options displayed depend on the section formatting options. If the section formatting is defined as **Variable Field Width**, you can choose a layout of one or two

columns and set the field to automatically expand to use available space. In either case, you can determine the scrolling type, whether a border is displayed and the number of rows for the field.

d. On the **Dependencies** tab, from the **Available fields** list, select the fields you want to designate as dependent fields in the IFRAME, and then click the **Add Selected Records** button to move the selected fields to the **Dependent fields** list.

e. Click **OK**.

Add or edit a sub-grid

1. To add a sub-grid, on the **Insert** tab, click the **Sub-Grid** button.

   - OR -

   To edit an existing sub-grid, click it, and then on the **Home** tab, in the **Edit** group, click the **Change Properties** button.

2. In the **Sub-Grid Properties** dialog box, on the **Display** tab, pay particular attention to the following fields:

   a. In the **Name** text box, enter a unique name. This can only contain alphanumeric characters and underscore.

f. In the **Data Source** section, use the **Entity** and **Default View** lists to specify the group of records that you want displayed in the sub-grid.

g. If you want to edit the view that you selected, click **Edit**. To create a new view, click **New**. More information: *Create or edit a system view for an entity*

3. On the **Formatting** tab, click the options for the number of columns and rows to display in the sub-grid.

4. Click **OK**.

Add or edit a web resource

You can add a Web resource that is an image, an HTML file, a Silverlight control, or a JScript library.

5. To add a Web resource, click the tab in which you'd like to insert it, and then on the **Insert** tab, click **Web Resource**.

   - OR -

   To edit a Web resource, select a tab and the Web resource that you want to edit, and then on the **Home** tab, click **Change Properties**.

6. In the **Add Web Resource** or **Web Resource Properties** dialog box, on the **General** tab, enter the information you want. In particular, note the following:

   - In the **Web Resource** box, select the image, HTML, Silverlight, or JScript library Web resource that you want.
   - In the **Name** box, enter a unique name for the field. The name can contain only alphanumeric characters and underscores.
   - After you add a Web resource, the **Web Resource Properties** section appears on this tab. It has options to set custom parameters or pass a record object-type code as a parameter.

7. On the **Formatting** tab, that options that are displayed depend on the section formatting options. In any case, you can determine the number of rows for the field, whether a border is displayed, and the scrolling type.
8. On the **Dependencies** tab, from the **Available fields** list, select the fields that are required by the Web resource, and then click the **Add Selected Records** button to move the selected fields to the **Dependent fields** list.
9. Click **OK**.

Add or edit form navigation for related entities

1. To add a link to a related entity, on **Home** tab, in the **Select** group, click **Navigation**. **Relationship Explorer** opens on the right side of the form editor.
2. In the **Relationship Explorer** list, select the related entity you want, drag it to the Navigation Pane, and drop it where you want it to be displayed.

   Tip: You can also create a new relationship by clicking the **New 1:N** or **New N:N** buttons at the bottom of **Relationship Explorer**. More information: *Create, edit, or view 1:N relationships between entities* (see "*Create or edit 1:N relationships between entities*" on page 593), *Create or edit N:N relationships between entities* (on page 600)
3. To edit the properties for this or any other related entity link in the Navigation Pane, select the link, and then on the **Home** tab, click **Change Properties**.
4. In the **Relationship Properties** dialog box, on the **Display** tab, type a new display label.
5. On the **Name** tab, you can view details about the entity relationship for this link. Click the **Edit** button to view or edit the relationship record. More information: *Create, edit, or view 1:N relationships between entities* (see "*Create or edit 1:N relationships between entities*" on page 593), *Create or edit N:N relationships between entities* (on page 600)
6. Click **OK**.

Edit form headers and footers

1. On the **Home** tab, in the **Select** group, click **Header** or **Footer**.
2. To edit the properties, on the **Home** tab, in the **Edit** group, click **Change Properties**.

   The **Header Properties** or the **Footer Properties** dialog box opens.
3. On the **Display** tab, specify the width of the field label.
4. On the **Formatting** tab, specify the number of columns you want in the header or footer. You can also specify field label alignment.
5. Click **OK**.
6. To add fields to the header or footer, in **Field Explorer**, select a field and drag it to the spot in which you want it to display.

Remove a tab, section, field, or IFRAME

1. On the **Home** tab, in the **Select** group, click **Body**.
2. Select the tab, section, field, or IFRAME that you want to remove.

Note: If a section or field is locked by default, it cannot be removed. If you have locked the section or field, you must unlock it before removing it. More information: Edit form field properties, *Edit a section* (see "*Edit section properties*" on page 586)

3. On the **Home** tab, in the **Edit** group, click **Remove**.
4. In the confirmation message, click **OK**.

Enable or disable the Form Assistant

1. In the Navigation Pane, click **Service**, and then click **Cases**.
2. On the **Customize** tab, in the **Design** group, click **Form**.
3. On the **Home** tab, in the **Form** group, click **Form Properties**.
4. In the **Form Properties** dialog box, click the **Display** tab.
5. In the **Form Assistant** section, select or clear the **Expanded by default** check box.

6. Edit the properties for parts of the form, as needed:

Edit form properties

1. On the **Home** tab, in the **Form** group, click **Form Properties**.
2. In the **Form Properties** dialog box, some of the properties you can edit include:
   - On the **Display** tab, in the **Form Name** box, edit the name that is displayed for the form.
   - In the **Page Navigation** section, select the check box if you want the form to display the page navigation.
   - On the **Non-Event Dependencies** tab, select the form fields that are required for any external, non-event scripts. These fields will not be removable from the form.
   - On the **Events** tab, you can do the following:
     - In the **Form Libraries** section, add or remove the JScript libraries that will be available for form or field events. You can also edit the libraries.
     - In the **Event Handlers** section, you can create a script that is executed when data in the form changes.

       i. Click **Add** to add a new script, or click **Edit** to edit an existing script.

       In the **Handler Properties** dialog box, supply the requested information. Select the **Enabled** check box to make the function available to be called by a field event.

       Click **OK**.

       More information: *Add or edit event scripts for fields and forms* (on page 532)
3. Click **OK**.

Edit form field properties

1. To add a new field, in the **Common Tasks** area, click **Add Fields**. In the **Add Fields** dialog box, select the fields you want to add to the form, and optionally, from the **Tab** and **Section** lists, select the tab and section in which you want to place the selected field or fields, and then click **OK**.

2. To edit a field, select the field you want to edit, and then in the **Common Tasks** area, click **Change Properties**.
3. In the **Field Properties** dialog box, edit a field as follows:
   - On the **Display** tab you can edit the following:
     - Change the label used for this field. This will not change the attribute display name, just the text in this form.
     - If necessary, select the **Display label on the form** check box to make the label visible on the form. Clear the check box if you want to have a field with no label, for example, if the field is the only one in a section with a clearly descriptive name.
     - Select **Disabled on the form** to make the field read-only for example, if the field displays a value calculated by a client-side script.
     - In the **Location** area, select the tab and section to which you want to move the field.
     - In the **Locking** area, specify whether you wish to lock the field to the form by selecting **Lock the field on the form**. This will prevent anyone from removing this field using the **Remove** command from the **Common Tasks** area. This will also protect the tab and section that contain this field from being removed.
   - On the **Formatting** tab, the formatting options displayed depend on the section formatting options. If the section formatting is defined as **Variable Field Width**, you can choose a layout of one or two columns and set the field to automatically expand to use available space. If the form formatting is defined as **Fixed Field Width**, you do not have the option of modifying the number of columns, but for **ntext** fields, you can define the number of rows for the field. For **bit** fields, you can set the formatting to Two radio buttons, Checkbox, or List.
   - On the **Schema** tab, the fields are read-only by default, and cannot be changed in the form for the entity.
   - On the **Events** tab, you can create a script that is executed when data in the field is changed:

     i. In the **Event List** box, select **onChange**, and then click **Edit**.

     In the **Handler Properties** dialog box, supply the requested information. Select the **Enabled** check box to make the function available to be called by a field event.

     On the **Non-Event Dependencies** tab, in the **Available fields** list, select any fields you have referenced in scripts, and then click the **Add Selected Records** button to move the selected fields to the **Dependent fields** list.

     - OR -

     From the **Dependent fields** list, select the fields you want to remove as dependent fields, then click the **Remove Selected Records** button to move the selected fields to the **Available fields** list.

     Click **OK**.
4. Click **OK**.

Edit tab properties

1. Click the tab you would like to edit. Then, on the **Home** tab, click **Change Properties**. The **Tab Properties** dialog box opens.
2. On the **Display** tab, enter a unique name in **Name**.
3. On the **Formatting** tab, specify whether you would like the tab to have one or two columns.
4. On the **Events** tab, you can add and edit form libraries and the TabStateChange event, which indicates when the tab is expanded or collapsed. More information: *Add or edit event scripts for fields and forms* (on page 532)
5. Click **OK**.

Edit section properties

1. Click the section that you want to edit. Then, on the **Home** tab in the **Edit** group, click **Change Properties**.
2. In the **Section Properties** dialog box, on the **Display** tab:
   a. Enter a unique name in **Name**.

h. In the **Width** text box, set the width of the label area for the fields in the section.

i. Select the **Visible by default** check box if you want to display the field. If you clear this check box, the field does not display in the **Reading Pane** in Microsoft Dynamics CRM for Microsoft Office Outlook. The field displays in the Microsoft Dynamics CRM web application unless you use JScript to define other behavior. In the web application, JScript overrides this check box.

3. On the **Formatting** tab, click the option for the number of columns you want. Also, click the options for field label alignment and field label position.
4. Click **OK**.

7. You can add event scripts. More information: *Add or edit event scripts for fields and forms* (on page 532)
8. Assign roles for the new form to determine which security roles will be able to view it:

Assign a security role to a form.

1. On the **Home** tab, in the **Form** group, click **Assign Roles**.
2. In the **Assign Roles** dialog box, select the security roles to which this form will be available. More information: Controlling Data Access
3. To make this the fallback form, select the **Enabled for fallback** check box.

   At least one form per entity must be a fallback form, the form that is displayed to a user when no other form is available for that user's security role.
4. Click **OK**.

9. Preview how the main form will appear and how events will function:
   a. On the **Home** tab, click **Preview**, and then select **Create Form**, **Update Form**, or **Read-Only Form**.
   b. To close the **Preview** form, on the **File** menu, click **Close**.
10. When you finish editing the form, click **Save As**. Enter a name for the form, and then click **OK**.
11. When your customizations are complete, publish them:

- To publish customizations for only the component that you are currently editing, on the **Home** tab, in the **Save** group, click **Publish**.
- To publish customizations for all unpublished components at one time, click **Publish All Customizations**.

Notes

- You cannot apply a requirement level to a field through a form. You apply requirement level constraints directly to the field.
- If you delete a field from a form, make sure the field is not required by other components or custom scripts. For example, the Opportunity form requires the Price List field to determine the pricing to use when adding a product to that opportunity. Removing the Price List field prevents adding a new product to an opportunity.
- Any time you change user interface elements or implement form scripts for an entity, you must publish changes to apply them. Any customizations that change the data schema of Microsoft Dynamics CRM such as custom entities, relationships, or fields are applied immediately.
- You cannot modify the visual style of forms, such as the font style, font size, or colors used in the form using the form editor. Modification of the Cascading Style Sheets (CSS) pages in the Web application or style properties of the form through scripts is not supported.

Related Topics

Understanding Entities 517

Add a tab to a form

1. In the Navigation Pane, click **Settings**.
2. Under **Customization**, click **Customizations**.
3. In the **Customization** area, click **Customize the System**.
4. Under **Components**, expand **Entities**, and then expand the entity you want.
5. Click **Forms**. In the list, click a form to edit it if it has a **Form Type** of **Main**.
6. On the **Insert** tab, click either **One Column** or **Two Columns**.
7. Click the tab you would like to edit. Then, on the **Home** tab, click **Change Properties**. The **Tab Properties** dialog box opens.
8. On the **Display** tab, enter a unique name in **Name**.
9. On the **Formatting** tab, specify whether you would like the tab to have one or two columns.
10. On the **Events** tab, you can add and edit form libraries and the TabStateChange event, which indicates when the tab is expanded or collapsed. More information: *Add or edit event scripts for fields and forms* (on page 532)
11. Click **OK**.
12. When you finish editing the form, click **Save and Close** to close the form.

13. You can preview how the main form will appear and how events will function:
    a. On the **Home** tab, click **Preview**, and then select **Create Form**, **Update Form**, or **Read-Only Form**.
    b. To close the **Preview** form, on the **File** menu, click **Close**.
14. When your customizations are complete, publish them:
    - To publish customizations for only the component that you are currently editing, on the **Home** tab, in the **Save** group, click **Publish**.
    - To publish customizations for all unpublished components at one time, click **Publish All Customizations**.

Add a section to a form

1. Click the tab area where you would like to add a section.
2. On the **Insert** tab, in the **Section** group, click **One Column**, **Two Columns**, **Three Columns**, or **Four Columns**.

   The new section is added to the bottom of the tab. You can edit its properties.
3. Click the section that you want to edit. Then, on the **Home** tab in the **Edit** group, click **Change Properties**.
4. In the **Section Properties** dialog box, on the **Display** tab:
   a. Enter a unique name in **Name**.
   b. In the **Width** text box, set the width of the label area for the fields in the section.
   c. Select the **Visible by default** check box if you want to display the field. If you clear this check box, the field does not display in the **Reading Pane** in Microsoft Dynamics CRM for Microsoft Office Outlook. The field displays in the Microsoft Dynamics CRM web application unless you use JScript to define other behavior. In the web application, JScript overrides this check box.
5. On the **Formatting** tab, click the option for the number of columns you want. Also, click the options for field label alignment and field label position.
6. Click **OK**.

Control which forms are available to users

You can control form and field access by assigning different security roles to different forms that you create.

1. In the Navigation Pane, click **Settings**.
2. Under **Customization**, click **Customizations**.
3. In the **Customization** area, click **Customize the System**.
4. Under **Components**, expand **Entities**, and then expand the entity you want.
5. Click **Forms**. In the list, click a form to edit it if it has a **Form Type** of **Main**.

6. On the **Home** tab, in the **Form** group, click **Assign Roles**.
7. In the **Assign Roles** dialog box, select the security roles to which this form will be available. More information: Controlling Data Access
8. To make this the fallback form, select the **Enabled for fallback** check box.

   At least one form per entity must be a fallback form, the form that is displayed to a user when no other form is available for that user's security role.
9. Click **OK**.
10. You can preview how the main form will appear and how events will function:
    a. On the **Home** tab, click **Preview**, and then select **Create Form**, **Update Form**, or **Read-Only Form**.
    b. To close the **Preview** form, on the **File** menu, click **Close**.
11. When you finish editing the form, click **Save and Close** to close the form.
12. When your customization is complete, publish it:
    - To publish customizations for only the component that you are currently editing, on the **Home** tab, in the **Save** group, click **Publish**.
    - To publish customizations for all unpublished components at one time, click **Publish All Customizations**.

Edit form headers and footers

You cannot add new headers or footers to the form, or move or remove the existing headers. You can edit the header and footer sections and properties.

1. In the Navigation Pane, click **Settings**.
2. Under **Customization**, click **Customizations**.
3. In the **Customization** area, click **Customize the System**.
4. Under **Components**, expand **Entities**, and then expand the entity you want.
5. Click **Forms**. In the list, click a form to edit it if it has a **Form Type** of **Main**.
6. On the **Home** tab, in the **Select** group, click **Header** or **Footer**.
7. To edit the properties, on the **Home** tab, in the **Edit** group, click **Change Properties**.

   The **Header Properties** or the **Footer Properties** dialog box opens.
8. On the **Display** tab, specify the width of the field label.
9. On the **Formatting** tab, specify the number of columns you want in the header or footer. You can also specify field label alignment.
10. Click **OK**.
11. To add fields to the header or footer, in **Field Explorer**, select a field and drag it to the spot in which you want it to display.

12. When you finish editing the form, click **Save and Close** to close the form.
13. You can preview how the main form will appear and how events will function:
    a. On the **Home** tab, click **Preview**, and then select **Create Form**, **Update Form**, or **Read-Only Form**.
    b. To close the **Preview** form, on the **File** menu, click **Close**.
14. When your customizations are complete, publish them:
    - To publish customizations for only the component that you are currently editing, on the **Home** tab, in the **Save** group, click **Publish**.
    - To publish customizations for all unpublished components at one time, click **Publish All Customizations**.

Edit section properties

1. In the Navigation Pane, click **Settings**.
2. Under **Customization**, click **Customizations**.
3. In the **Customization** area, click **Customize the System**.
4. Under **Components**, expand **Entities**, and then expand the entity you want.
5. Click **Forms**. In the list, click a form to edit it if it has a **Form Type** of **Main**.
6. Click the section that you want to edit. Then, on the **Home** tab in the **Edit** group, click **Change Properties**.
7. In the **Section Properties** dialog box, on the **Display** tab:
    a. Enter a unique name in **Name**.
    b. In the **Width** text box, set the width of the label area for the fields in the section.
    c. Select the **Visible by default** check box if you want to display the field. If you clear this check box, the field does not display in the **Reading Pane** in Microsoft Dynamics CRM for Microsoft Office Outlook. The field displays in the Microsoft Dynamics CRM web application unless you use JScript to define other behavior. In the web application, JScript overrides this check box.
8. On the **Formatting** tab, click the option for the number of columns you want. Also, click the options for field label alignment and field label position.
9. Click **OK**.
10. You can preview how the main form will appear and how events will function:
    a. On the **Home** tab, click **Preview**, and then select **Create Form**, **Update Form**, or **Read-Only Form**.
    b. To close the **Preview** form, on the **File** menu, click **Close**.
11. When you finish editing the form, click **Save and Close** to close the form.
12. When your customization are complete, publish them:
    - To publish customizations for only the component that you are currently editing, on the **Home** tab, in the **Save** group, click **Publish**.

- To publish customizations for all unpublished components at one time, click **Publish All Customizations**.

Edit tab properties

1. In the Navigation Pane, click **Settings**.
2. Under **Customization**, click **Customizations**.
3. In the **Customization** area, click **Customize the System**.
4. Under **Components**, expand **Entities**, and then expand the entity you want.
5. Click **Forms**. In the list, click a form to edit it if it has a **Form Type** of **Main**.
6. Click the tab you would like to edit. Then, on the **Home** tab, click **Change Properties**. The **Tab Properties** dialog box opens.
7. On the **Display** tab, enter a unique name in **Name**.
8. On the **Formatting** tab, specify whether you would like the tab to have one or two columns.
9. On the **Events** tab, you can add and edit form libraries and the TabStateChange event, which indicates when the tab is expanded or collapsed. More information: *Add or edit event scripts for fields and forms* (on page 532)
10. Click **OK**.
11. You can preview how the main form will appear and how events will function:
    a. On the **Home** tab, click **Preview**, and then select **Create Form**, **Update Form**, or **Read-Only Form**.
    b. To close the **Preview** form, on the **File** menu, click **Close**.
12. When you finish editing the form, click **Save and Close** to close the form.
13. When your customization are complete, publish them:
    - To publish customizations for only the component that you are currently editing, on the **Home** tab, in the **Save** group, click **Publish**.
    - To publish customizations for all unpublished components at one time, click **Publish All Customizations**.

Add or edit form navigation for related entities

In the form Navigation Pane, you can add links to related entities. When a user clicks one of these links in a record, the associated view for the entity is displayed. If you want to modify the way an associated view is displayed, see *Edit the associated view* (on page 556).

1. In the Navigation Pane, click **Settings**.
2. Under **Customization**, click **Customizations**.
3. In the **Customization** area, click **Customize the System**.

4. Under **Components**, expand **Entities**, and then expand the entity you want.
5. Click **Forms**. In the list, click a form to edit it if it has a **Form Type** of **Main**.
6. To add a link to a related entity, on **Home** tab, in the **Select** group, click **Navigation**. **Relationship Explorer** opens on the right side of the form editor.
7. In the **Relationship Explorer** list, select the related entity you want, drag it to the Navigation Pane, and drop it where you want it to be displayed.

   Tip: You can also create a new relationship by clicking the **New 1:N** or **New N:N** buttons at the bottom of **Relationship Explorer**. More information: *Create, edit, or view 1:N relationships between entities* (see "*Create or edit 1:N relationships between entities*" on page 593), *Create or edit N:N relationships between entities* (on page 600)

1. To edit the properties for this or any other related entity link in the Navigation Pane, select the link, and then on the **Home** tab, click **Change Properties**.
2. In the **Relationship Properties** dialog box, on the **Display** tab, type a new display label.
3. On the **Name** tab, you can view details about the entity relationship for this link. Click the **Edit** button to view or edit the relationship record. More information: *Create, edit, or view 1:N relationships between entities* (see "*Create or edit 1:N relationships between entities*" on page 593), *Create or edit N:N relationships between entities* (on page 600)
4. Click **OK**.
5. You can preview how the main form will appear and how events will function:
   a. On the **Home** tab, click **Preview**, and then select **Create Form**, **Update Form**, or **Read-Only Form**.
   b. To close the **Preview** form, on the **File** menu, click **Close**.
6. When you finish editing the form, click **Save and Close** to close the form.
7. When your customization are complete, publish them:
   - To publish customizations for only the component that you are currently editing, on the **Home** tab, in the **Save** group, click **Publish**.
   - To publish customizations for all unpublished components at one time, click **Publish All Customizations**.

Set non-event dependencies for a form

Can I do this task?

This task requires the System Administrator or System Customizer security role or equivalent permissions. Customization tasks can be performed only while you are online. More information: *Customization Permissions* (on page 490)

If you have custom code that depends on certain fields being present in Microsoft Dynamics CRM, set these fields up as dependencies so that the fields cannot inadvertently be removed from the form.

1. In the Navigation Pane, click **Settings**, click **Customizations**, and then click **Customize the System**.

2. Open the entity that contains the form that has the attributes your external code refers to, and then click **Forms and Views**.
3. Click **Form**, then on the Actions toolbar, click **Actions**, and then click **Edit**.
4. On the **Home** tab, click **Form Properties**.
5. On the **Non-Event Dependancies** tab, select the fields you want to make dependent, and click the **Add Selected Records** button to move them to the **Dependent fields** list.
6. Click **OK** to close the **Form Properties** dialog box.
7. Click **Save and Close** to close the form.
8. Click **Save and Close** to close the entity.
9. When your customizations are complete, publish them:
   - To publish customizations for only the component that you are currently editing, on the **Home** tab, in the **Save** group, click **Publish**.
   - To publish customizations for all unpublished components at one time, click **Publish All Customizations**.

Related Topics

Understanding Entities 517
Customization Capabilities 489

Add a field to a form

1. In the Navigation Pane, click **Settings**.
2. Under **Customization**, click **Customizations**.
3. In the **Customization** area, click **Customize the System**.
4. Under **Components**, expand **Entities**, and then expand the entity you want.
5. Click **Forms**. In the list, click a form to edit it if it has a **Form Type** of **Main**.
6. In the form, select the section to which you want to add a field.
   a. In the **Field Explorer** pane, double-click the field that you want to add to the form.
7. You can preview how the main form appears and how events functions:
   a. On the **Home** tab, click **Preview**, and then select **Create Form**, **Update Form**, or **Read-Only Form**.
   b. To close the **Preview** form, on the **File** menu, click **Close**.
8. When you finish editing the form, click **Save and Close** to close the form.
9. When your customization are complete, publish them:

- To publish customizations for only the component that you are currently editing, on the **Home** tab, in the **Save** group, click **Publish**.
- To publish customizations for all unpublished components at one time, click **Publish All Customizations**.

Add or edit form navigation for related entities

1. To add an IFRAME, on the **Insert** tab, click **IFRAME**.

   - OR -

   Select a tab and then the IFRAME in the tab you want to edit, and then on the **Home** tab, click **Change Properties**.

2. On the **Add an IFRAME** or **IFRAME Properties** dialog box, on the **General** tab, enter the information you want. In particular, note the following:

   - In the **Name** box, enter a unique name for the IFRAME. The name can only contain alphanumeric characters and underscore.
   - In the **URL** box, enter a full URL for the IFRAME. You can optionally select the **Pass record object-type code and unique identifier as parameters** check box. More information: *Passing IFRAME parameters (Microsoft Dynamics CRM SDK)* (see Passing IFRAME parameters (Microsoft Dynamics CRM SDK) - http://go.microsoft.com/fwlink/?LinkId=201317)
   - The **Restrict cross-frame scripting** check box is selected by default for security purposes. Exercise great caution in allowing cross-frame scripting.

   Caution: Applications can interact with each other through an IFRAME. The **Restrict cross-frame scripting** check box is selected by default. Remove this restriction only if you are sure that the site you are using as the target of the IFRAME can be trusted.

1. In the **Formatting** options displayed depend on the section formatting options. In any case, you can determine the number of rows for the field, whether a border is displayed, and the scrolling type.
2. On the **Dependencies** tab, from the **Available fields** list, select the fields you want to designate as dependent fields in the IFRAME, and then click the **Add Selected Records** button to move the selected fields to the **Dependent fields** list.
3. Click **OK**.

1. In the Navigation Pane, click **Settings**.
2. Under **Customization**, click **Customizations**.
3. In the **Customization** area, click **Customize the System**.
4. Under **Components**, expand **Entities**, and then expand the entity you want.
5. Click **Forms**. In the list, click a form to edit it if it has a **Form Type** of **Main**.
6. On the **Home** tab, in the **Form** group, click **Form Properties**.
7. In the **Form Properties** dialog box, some of the properties you can edit include:

- On the **Display** tab, in the **Form Name** box, edit the name that is displayed for the form.

  In the **Page Navigation** section, select the check box if you want the form to display the page navigation.

- On the **Non-Event Dependencies** tab, select the form fields that are required for any external, non-event scripts. These fields will not be removable from the form.

- On the **Events** tab, you can do the following:

  - In the **Form Libraries** section, add or remove the JScript libraries that will be available for form or field events. You can also edit the libraries.

  - In the **Event Handlers** section, you can create a script that is executed when data in the form changes.

    1. Click **Add** to add a new script, or click **Edit** to edit an existing script.
    2. In the **Handler Properties** dialog box, supply the requested information. Select the **Enabled** check box to make the function available to be called by a field event.
    3. Click **OK**.

  More information: *Add or edit event scripts for fields and forms* (on page 532)

8. Click **OK**.
9. You can preview how the main form will appear:
   a. On the **Home** tab, click **Preview**, and then select **Create Form**, **Update Form**, or **Read-Only Form**.
   b. To close the **Preview** form, on the **File** menu, click **Close**.
10. When you finish editing the form, click **Save and Close** to close the form.
11. When your customization are complete, publish them:
    - To publish customizations for only the component that you are currently editing, on the **Home** tab, in the **Save** group, click **Publish**.
    - To publish customizations for all unpublished components at one time, click **Publish All Customizations**.

Add or edit a sub-grid

1. To add a sub-grid, on the **Insert** tab, click the **Sub-Grid** button.

   - OR -

   To edit an existing sub-grid, click it, and then on the **Home** tab, in the **Edit** group, click the **Change Properties** button.
2. In the **Sub-Grid Properties** dialog box, on the **Display** tab, pay particular attention to the following fields:
   a. In the **Name** text box, enter a unique name. This can only contain alphanumeric characters and underscore.

b. In the **Data Source** section, use the **Entity** and **Default View** lists to specify the group of records that you want displayed in the sub-grid.

c. If you want to edit the view that you selected, click **Edit**. To create a new view, click **New**. More information: *Create or edit a system view for an entity*

3. On the **Formatting** tab, click the options for the number of columns and rows to display in the sub-grid.
4. Click **OK**.

Add or Edit a Web Resource

Add or edit an image Web resource

Add or edit a text Web resource

Add or edit a Silverlight Web resource

Add or edit a Web resource for a form

Entity Relationships

Microsoft Dynamics CRM supports the following types of relationships between entities:

- Hierarchical Relationships
- N:N (Many-to-Many) Relationships
- Self-Referential Relationships

Hierarchical Relationships

A hierarchical relationship allows each child record to store a reference to one parent record. A parent record can be referenced by an unlimited number of child records. The parent record can display all the child records in an associated view.

Hierarchical relationships provide opportunities to configure a number of behaviors that affect data integrity and the business rules in your organization. There are also limitations on the types of relationships that you can create. More information: *Understanding Hierarchical Entity Relationships* (on page 592)

- A **1:N Relationship** is created or viewed from the primary entity. Any one record from the primary entity can be referenced by many records from the related entity.

A **N:1 Relationship** is created or viewed from the related entity. Many records from the related entity can reference any one record from the primary entity.

N:N (Many-to-Many) Relationships

N:N (Many-to-Many) relationships are not hierarchical because a record does not store a unique reference to another record. An N:N relationship allows reciprocally relating one or more records of an entity to a record of another entity. Also, an N:N relationship may be self-referential, meaning reciprocally relating one or more records of an entity to a record in the same entity.

Users who are associated with a security role that allows Read and Append privileges to one entity and Read, Write, and Append To privileges to another entity can relate records using this relationship.

Self-Referential Relationships

Both hierarchical relationships and N:N relationships can be self-referential. This means that an entity can have a relationship with itself. This permits records to be directly associated with other records of the same type. For example, opportunities can be linked to related opportunities.

The only limitation to self-referential relationships is that records cannot be related to themselves in a parental relationship. This would create a circular reference.

Understanding Hierarchical Entity Relationships

Hierarchical entity relationships require that one of the records have a field to store a unique identifier that references another record. The record that stores the reference to another record is called the child record. The record referenced by the unique identifier in the child record is called the parent record.

A hierarchical relationship allows each child record to store a reference to one parent record. A parent record can be referenced by an unlimited number of child records. The parent record can display all the child records in an associated view.

Data Integrity

A hierarchical relationship introduces the opportunity to define rules for data integrity. For example, an opportunity record has no meaning if it isn't associated with a customer record. Microsoft Dynamics CRM requires that an opportunity record be related to a customer record. However, a task activity can be meaningful whether it is associated to another record or not. Relating a task activity to another record is optional.

When you create a relationship, you must choose whether to enforce rules for data integrity. If you make the relationship field on the related entity required by setting a requirement level of **Business Required**, you can guarantee that each of the related entity records created through the Microsoft Dynamics CRM application will be related to a record of the parent entity.

Defining Relationships

Relationships are defined between entities. The entity that will represent the child records is called the related entity. A relationship attribute, also known as a lookup attribute, is created on the related entity to allow records to store a reference to a parent record. The entity that represents the parent records is called the primary entity in the relationship.

- A **1:N Relationship** is created or viewed from the primary entity. Any one record from the primary entity can be referenced by many records from the related entity.

A **N:1 Relationship** is created or viewed from the related entity. Many records from the related entity can reference any one record from the primary entity.

Relationship Behavior

Once you create a hierarchical relationship, you can control how the relationship behaves to support data integrity and business rules for your organization. The relationship can control how actions performed on a parent record *cascades* down to a child record.

You can configure the relationship behavior for the following actions performed on the primary entity record:

- Assign
- Share
- Unshare
- Reparent
- Delete
- Merge

Choose from three predefined and commonly used types of behavior, or choose to configure the cascading action performed on the record of the primary entity.

The three predefined types of behavior are:

- **Parental**. All actions cascade down to the child records. Deleting a parent record also deletes all child records. Reassigning a parent record to a user also reassigns all the child records to the same user.
- **Referential**. No actions cascade down to the child records. Deleting a parent record also deletes any linking data in any child record.
- **Referential, Restrict Delete**. No actions cascade down to the child records, except that deletion is not allowed if there are any child records.

Also choose to define specific cascading behavior for each of the actions. For most actions, your choices are:

- **Cascade All**. This is a parental type of behavior. All actions cascade down to all child records, including inactive records.
- **Cascade Active**. All actions only cascade down to all active child records.
- **Cascade User-Owned**. Actions only cascade down to child records assigned to the same user as the owner of the parent record.
- **Cascade None**. This a referential type of behavior. No actions cascade down to child records.

Data integrity must be preserved when data in records changes or when the status of records change. Deleting a parent record breaks the data integrity of any child record if the relationship is required. There are three ways to address this:

- Use **Referential, Restrict Delete** behavior to prevent the deletion of any record with a child record.
- Use **Parental** behavior to delete any child record when deleting a parent record.
- Set the Delete action to **Cascade All** or **Referential, Restrict Delete**.

If the relationship is not required, it is sufficient to remove the data that establishes the link to the deleted parent record.

In addition to data integrity, your business can apply relationship behavior when data in records change or when the status of records change. The relationship behavior can cascade this action so it does not need to be done manually.

Limitations for Hierarchical Relationships

- Each entity can have only one parental relationship. Most Microsoft Dynamics CRM system entities already have a parental relationship and this relationship cannot be changed.
- Entities can have referential relationships with any entity, including business entities. You can create multiple relationships between two entities. Entities can have referential relationships with themselves, allowing linked records of the same type. However, a record cannot be linked to itself.
- In Microsoft Dynamics CRM, the customer entities are **Accounts** or **Contacts**. These two entities together represent a composite Customer entity. Some Microsoft Dynamics CRM business entities, such as **Opportunity** and **Case** must be related to a Customer. However, you cannot create this type of relationship with custom entities.

Mapping

Users can create new child records in an associated view. When this happens, data from the parent record is copied into the form for the new child record. By default, a reference to the parent record is always copied to the relationship lookup field in the child record. You can choose whether data from other fields should be copied at the same time. More information: *Mapping Entity Attributes* (see "*Mapping Entity Fields*" on page 538)

Create or edit 1:N relationships between entities

Can I do this task?

This task requires the System Administrator or System Customizer security role or equivalent permissions. Customization tasks can be performed only while you are online. More information: *Customization Permissions* (on page 490)

A 1:N relationship is a hierarchical relationship. More information: *Understanding Hierarchical Entity Relationships* (on page 592)

1. In the Navigation Pane, click **Settings**.
2. Under **Customization**, click **Customizations**.
3. In the **Customization** area, click **Customize the System**.
4. Under **Components**, expand **Entities**, and then expand the entity you want.
5. Under the entity, click **1:N Relationships**.
6. To edit a relationship or view the details for a relationship, select the relationship, and on the Actions toolbar, click **Actions**, and then click **Edit**.

   - OR -

   To add a new relationship, click the **New 1-to-Many Relationship** button.

   Note
   You can't add new relationships to some entities, for example Address or Activity. More information: *Understanding Hierarchical Entity Relationships* (on page 592)

1. For a new relationship, in the **Relationship Definition** section, select the **Related Entity**. A default **Name** value will be added after you select the **Related Entity**. You can accept this name or enter a new one.

   Note

   If you change the**Related Entity** before you save, the value of the **Name** field will not change. Make sure that this value is meaningful before you save.

1. In the **Lookup Field** section, for a new relationship, enter information in the following fields:
   - Display Name
   - Name
   - In the **Requirement Level** list, you can choose one of the following options:
     - No Constraint
     - Business Required
     - Business Recommended
2. In the **Navigation Pane Item for Primary Entity** section, in the **Display Option** list, you can choose one of the following options:
   - Use Plural Name
   - Use Custom Label
   - Do Not Display

   When the **Use Plural Name** or **Use Custom Label** options are selected you can choose from the **Display Area** field to specify where the relationship label will be displayed on the form. You can also specify the **Display Order** to control where the label will be included within the selected display area. The range of allowed numbers begins with 10,000. Relationships with a lower **Display Order** value will appear above other relationships with a higher value.
3. In the **Relationship Behavior** section, for new relationships and for existing relationships with **Type of Behavior** set to **Parental**, you can choose the type of relationship.

   What happens when you take an action on this entity is defined by the type of relationship. For **Parental**, **Referential**, and **Referential, Restrict Delete**, the specific behaviors are determined by the relationship type. For **Configurable Cascading**, you must select the behavior you want for each possible action.

   a. In the **Type of Behavior** list you can choose one of the following relationship types:
      - Parental
      - Referential
      - Referential, Restrict Delete
      - Configurable Cascading

   b. If you selected the **Configurable Cascading** relationship type, for each of the six actions listed below, you can select the behavior for the action.

      If you set all the behaviors for the actions to match the behaviors for the actions for the other relationship types, when you save the relationship, the type of behavior is automatically set to the

other type. For example, if you set all the actions to **Cascade All**, the relationship type is changed from **Configurable Cascading** to **Parental**.

- Assign
- Share
- Unshare
- Reparent
- Delete
- Merge

The behaviors for these actions include:

- Cascade All
- Cascade None
- Cascade Active
- Cascade User-Owned
- Remove Link

4. Click **Save and Close** to close the **Relationship** form.
5. When your customizations are complete, publish them:
   - To publish customizations for only the component that you are currently editing, on the **Home** tab, in the **Save** group, click **Publish**.
   - To publish customizations for all unpublished components at one time, click **Publish All Customizations**.

Notes

- A custom entity cannot be the primary entity in a relationship with a related system entity that cascades. This means you cannot have a relationship with any action set to **Cascade All**, **Cascade Active**, or **Cascade User-Owned** between a primary custom entity and a related system entity.
- No new relationship can have any action set to **Cascade All**, **Cascade Active**, or **Cascade User-Owned** if the related entity in that relationship already exists as a related entity in another relationship that has any action set to **Cascade All**, **Cascade Active**, or **Cascade User-Owned**. This avoids relationships that create a multi-parent relationship.
- Any time you change user interface elements or implement form scripts for an entity, you must publish changes to apply them. Any customizations that change the data schema of Microsoft Dynamics CRM such as custom entities, relationships, or fields are applied immediately.

Related Topics

Understanding Hierarchical Entity Relationships 592

Understanding Entities 517

Create or edit N:1 relationships between entities

Can I do this task?

This task requires the System Administrator or System Customizer security role or equivalent permissions. Customization tasks can be performed only while you are online. More information: *Customization Permissions* (on page 490)

A N:1 relationship is a hierarchical relationship. More information: *Understanding Hierarchical Entity Relationships* (on page 592)

1. In the Navigation Pane, click **Settings**.
2. Under **Customization**, click **Customizations**.
3. In the **Customization** area, click **Customize the System**.
4. Under **Components**, expand **Entities**, and then expand the entity you want.
5. Click **N:1 Relationships**.
6. To edit a relationship or view the details for a relationship, select the relationship, and on the Actions toolbar, click **Actions**, and then click **Edit**.

   - OR -To add a new relationship, click the **New Many-to-1 Relationship** button.
7. For a new relationship, in the **Relationship Definition** section, select the **Primary Entity**. A default **Name** value will be added after you select the **Primary Entity**. You can accept this name or enter a new one.

   Note
   If you change the **Primary Entity** before you save, the value of the **Name** field will not change. Make sure that this value is meaningful before you save.

1. In the **Lookup Field** section, for a new relationship, enter information in the following fields:
   - Display Name
   - Name
   - In the **Requirement Level** list, you can choose one of the following options:
     - No Constraint
     - Business Required
     - Business Recommended
2. In the **Navigation Pane Item for Primary Entity** section, in the **Display Option** list, you can choose one of the following options:
   - Use Plural Name
   - Use Custom Label
   - Do Not Display

   When the **Use Plural Name** or **Use Custom Label** options are selected you can choose from the **Display Area** field to specify where the relationship label will be displayed on the form. You can also

specify the **Display Order** to control where the label will be included within the selected display area. The range of allowed numbers begins with 10,000. Relationships with a lower **Display Order** value will appear above other relationships with a higher value.

3. In the **Relationship Behavior** section, for new relationships and for existing relationships with **Type of Behavior** set to **Parental**, you can choose the type of relationship.

   What happens when you take an action on this entity is defined by the type of relationship. For **Parental**, **Referential**, and **Referential, Restrict Delete**, the specific behaviors are determined by the relationship type. For **Configurable Cascading**, you must select the behavior you want for each possible action.

   a. In the **Type of Behavior** list you can choose one of the following relationship types:

      - Parental
      - Referential
      - Referential, Restrict Delete
      - Configurable Cascading

   b. If you selected the **Configurable Cascading** relationship type, for each of the six actions listed below, you can select the behavior for the action.

      If you set all the behaviors for the actions to match the behaviors for the actions for the other relationship types, when you save the relationship, the type of behavior is automatically set to the other type. For example, if you set all the actions to **Cascade All**, the relationship type is changed from **Configurable Cascading** to **Parental**.

      - Assign
      - Share
      - Unshare
      - Reparent
      - Delete
      - Merge

      The behaviors for these actions include:

      - Cascade All
      - Cascade None
      - Cascade Active
      - Cascade User-Owned
      - Remove Link

4. Click **Save and Close** to close the **Relationship** form.
5. When your customizations are complete, publish them:

   - To publish customizations for only the component that you are currently editing, on the **Home** tab, in the **Save** group, click **Publish**.

- To publish customizations for all unpublished components at one time, click **Publish All Customizations**.

Notes

- A custom entity cannot be the primary entity in a relationship with a related system entity that cascades. This means you cannot have a relationship with any action set to **Cascade All**, **Cascade Active**, or **Cascade User-Owned** between a primary custom entity and a related system entity.
- No new relationship can have any action set to **Cascade All**, **Cascade Active**, or **Cascade User-Owned** if the related entity in that relationship already exists as a related entity in another relationship that has any action set to **Cascade All**, **Cascade Active**, or **Cascade User-Owned**. This avoids relationships that create a multi-parent relationship.
- Any time you change user interface elements or implement form scripts for an entity, you must publish changes to apply them. Any customizations that change the data schema of Microsoft Dynamics CRM such as custom entities, relationships, or fields are applied immediately.

Related Topics

Understanding Hierarchical Entity Relationships 592
Understanding Entities 517

Create or edit N:N relationships between entities

Can I do this task?

This task requires the System Administrator or System Customizer security role or equivalent permissions. Customization tasks can be performed only while you are online. More information: *Customization Permissions* (on page 490)

More information: *Entity Relationships ./help/ug_cust_entity_Relationships.htm*

1. In the Navigation Pane, click **Settings**.
2. Under **Customization**, click **Customizations**.
3. In the **Customization** area, click **Customize the System**.
4. Under **Components**, expand **Entities**, and then expand the entity you want.
5. Click **N:N Relationships**.
6. To edit a relationship or view the details for a relationship, select the relationship, and on the Actions toolbar, click **Actions**, and then click **Edit**.

   - OR -To add a new relationship, click the **New Many-to-Many Relationship** button.
7. For a new relationship, in the **Current Entity** section, in the **Display Option** list, you can choose one of the following options:
   - Use Plural Name
   - Use Custom Label

- Do Not Display

When the **Use Entity Plural Name** or **Use Custom Label** options are selected you can choose from the **Display Area** field to specify where the relationship label will be displayed on the form. You can also specify the **Display Order** to control where the label will be included within the selected display area.

8. In the **Other Entity** section, select the other entity in the **Entity Name** list.

Note
When you choose the **Entity Name**, default values will be set for the **Name** and **Relationship Entity Name** fields in the **Relationship Definition** section. If you change the **Entity Name** value before you save, these names will not change. Make sure these names are meaningful before saving.

1. In the **Relationship Definition** section, confirm the **Name** and the **Relationship Entity Name**.
2. These values must be unique among N:N relationships.
3. Click **Save and Close** to close the **N:N Relationship** form.
4. When your customizations are complete, publish them:
   - To publish customizations for only the component that you are currently editing, on the **Home** tab, in the **Save** group, click **Publish**.
   - To publish customizations for all unpublished components at one time, click **Publish All Customizations**.

Note
Any time you change user interface elements or implement form scripts for an entity, you must publish changes to apply them. Any customizations that change the data schema of Microsoft Dynamics CRM such as custom entities, relationships, or fields are applied immediately.

Related Topics

Entity Relationships 592
Understanding Hierarchical Entity Relationships 592
Mapping Entity Fields 538
Understanding Entities 517

Add form navigation for related entities

In the form Navigation Pane, you can add links to related entities. When a user clicks one of these links in a record, the associated view for the entity is displayed. If you want to modify the way an associated view is displayed, see *Edit the associated view* (on page 556).

1. In the Navigation Pane, click **Settings**.
2. Under **Customization**, click **Customizations**.
3. In the **Customization** area, click **Customize the System**.
4. Under **Components**, expand **Entities**, and then expand the entity you want.

5. Click **Forms**. In the list, click a form to edit it if it has a **Form Type** of **Main**.
6. To add a link to a related entity, on **Home** tab, in the **Select** group, click **Navigation**. **Relationship Explorer** opens on the right side of the form editor.
7. In the **Relationship Explorer** list, select the related entity you want, drag it to the Navigation Pane, and drop it where you want it to be displayed.

   Tip: You can also create a new relationship by clicking the **New 1:N** or **New N:N** buttons at the bottom of **Relationship Explorer**. More information: *Create, edit, or view 1:N relationships between entities* (see "*Create or edit 1:N relationships between entities*" on page 593), *Create or edit N:N relationships between entities* (on page 600)

1. To edit the properties for this or any other related entity link in the Navigation Pane, select the link, and then on the **Home** tab, click **Change Properties**.
2. In the **Relationship Properties** dialog box, on the **Display** tab, type a new display label.
3. On the **Name** tab, you can view details about the entity relationship for this link. Click the **Edit** button to view or edit the relationship record. More information: *Create, edit, or view 1:N relationships between entities* (see "*Create or edit 1:N relationships between entities*" on page 593), *Create or edit N:N relationships between entities* (on page 600)
4. Click **OK**.
5. You can preview how the main form will appear and how events will function:
   a. On the **Home** tab, click **Preview**, and then select **Create Form**, **Update Form**, or **Read-Only Form**.
   b. To close the **Preview** form, on the **File** menu, click **Close**.
6. When you finish editing the form, click **Save and Close** to close the form.
7. When your customization are complete, publish them:
   - To publish customizations for only the component that you are currently editing, on the **Home** tab, in the **Save** group, click **Publish**.
   - To publish customizations for all unpublished components at one time, click **Publish All Customizations**.

Edit entity messages

Can I do this task?

This task requires the System Administrator or System Customizer security role or equivalent permissions. Customization tasks can be performed only while you are online. More information: *Customization Permissions* (on page 490)

When you customize business entity or business field display names, some messages displayed by Microsoft Dynamics CRM will reference the default display names. Edit the default messages to match your customized display names.

1. In the Navigation Pane, click **Settings**, click **Customizations**, and then click **Customize the System**.
2. In the list of entities, expand the entity that has custom display names set.

3. Click **Messages**.
4. For each message you want to change, double-click the message, and then in the **Custom Display String** box, modify the message.
5. In the message form, click **Save and Close**.
6. In the entity form, click **Save**.
7. When your customizations are complete, publish them:
   - To publish customizations for only the component that you are currently editing, on the **Home** tab, in the **Save** group, click **Publish**.
   - To publish customizations for all unpublished components at one time, click **Publish All Customizations**.

Note
Some messages contain numbered parameter placeholders that look like this: {0}. These are used to provide a reference to a current record or other related record. Do not change these parameter placeholders.

Related Topics

Understanding Entities 517

Edit a global option set

Can I do this task?

This task requires the System Administrator or System Customizer security role or equivalent permissions. Customization tasks can be performed only while you are online. More information: *Customization Permissions* (on page 490)

This procedure guides you through editing some properties in an option set.

1. In the Navigation Pane, click **Settings**.
2. Under **Customization**, click **Customizations**.
3. In the **Customization** area, click **Customize the System**.
4. In the Navigation Pane, click **Option Sets**.

Note
Not all option sets can be edited. To see if you can edit an option set, look at its row in the list and verify that the Customizable column is set to **True**.

1. To open the option set record that you want to edit, double-click it.
2. You can change the **Display Name**.

Note

When you add this option set as a field to an entity, you do not have to use the display name that you enter here. You can modify the name as desired in the **Label** text box when you add the option set field.

You cannot edit the value in the **Name** box.

1. In the **Options** box, click the **Add** icon to add an option for the list.
2. In the **Label** text box, enter the text that you want for this option.
3. In the **Value** text box, enter a set of integers for this option. Use the following guidelines when you add this number:
   - Use the digits that are the prefix for option sets in this solution. If you're creating this option set in the default solution, the prefix is 10,000.
   - After the prefix, add one or more numbers that will uniquely identify this option within the option set.
4. Repeat steps 6 through 8 for each option that you want to add.
5. Click **Save and Close**.
6. Publish your customizations. After you have published, the new option set is available to add to an entity:
   - To publish customizations for only the component that you are currently editing, on the **Home** tab, in the **Save** group, click **Publish**.
   - To publish customizations for all unpublished components at one time, click **Publish All Customizations**.

Related Topics

Understanding Entities 517
Entity Relationships 592

Create a new global option set

Can I do this task?

This task requires the System Administrator or System Customizer security role or equivalent permissions. Customization tasks can be performed only while you are online. More information: *Customization Permissions* (on page 490)

This procedure guides you through the process of creating a global option set. A global option set is a set of label value pairs that an option set field can use.

You can add the same global option set to one or more option set fields in entity forms in Microsoft Dynamics CRM.

1. In the Navigation Pane, click **Settings**.
2. Under **Customization**, click **Customizations**.

3. In the **Customization** area, click **Customize the System**.
4. In the Navigation Pane, click **Option Sets**, and then on the Actions toolbar, click **New**.
5. Enter the **Display Name** for the option set.

   Note
   When you associate an existing global option set to an option set field, you don't have to use the display name that you enter here. You can modify the display name in the **Label** text box when you add the option set field.
6. In the **Name** box, Microsoft Dynamics CRM creates a name for this entity by using the text that you entered in the **Display Name** field. You can modify this text before saving the entity.
7. In the **Options** box, click the **Add** button to add an option for the list.
8. In the **Label** text box, enter the text that you want for this option.
9. In the **Value** text box, a set of integers is generated for this option based on the following guidelines:
   - The prefix uses the **Option Value Prefix** value that was set for the publisher of this solution. If you are creating this option set in the default solution, the prefix is 10,000.
   - Each time you add a new option, after the prefix, the value is auto-incremented to create a unique value.

     Although you can edit the value in this text box, the best practice is to accept the auto-generated value.
10. Repeat steps 6 through 8 for each option that you want to add.
11. Click the **Save and Close** button.
12. To make the new option set available to add as a field to a form, you must publish your customizations:
    - To publish customizations for only the component that you are currently editing, on the **Home** tab, in the **Save** group, click **Publish**.
    - To publish customizations for all unpublished components at one time, click **Publish All Customizations**.

Related Topics

Understanding Entities 517
Entity Relationships 592

Add or Edit a Web Resource

Add or edit an image Web resource

Add or edit a text Web resource

Add or edit a Silverlight Web resource

Add or edit a Web resource for a form (see "*Add or edit a form web resource*" on page **Error! Bookmark not defined.**)

Add or edit a form web resource

1. In the Navigation Pane, click **Settings**.
2. Under **Customization**, click **Customizations**.
3. In the **Customization** area, click **Customize the System**.
4. Under **Components**, expand **Entities**, and then expand the entity you want.
5. Click **Forms**. In the list, click a form to edit it if it has a **Form Type** of **Main**.

   You can add a Web resource that is an image, an HTML file, a Silverlight control, or a JScript library.
6. To add a Web resource, click the tab in which you'd like to insert it, and then on the **Insert** tab, click **Web Resource**.

   - OR -

   To edit a Web resource, select a tab and the Web resource that you want to edit, and then on the **Home** tab, click **Change Properties**.
7. In the **Add Web Resource** or **Web Resource Properties** dialog box, on the **General** tab, enter the information you want. In particular, note the following:
   - In the **Web Resource** box, select the image, HTML, Silverlight, or JScript library Web resource that you want.
   - In the **Name** box, enter a unique name for the field. The name can contain only alphanumeric characters and underscores.
   - After you add a Web resource, the **Web Resource Properties** section appears on this tab. It has options to set custom parameters or pass a record object-type code as a parameter.
8. On the **Formatting** tab, that options that are displayed depend on the section formatting options. In any case, you can determine the number of rows for the field, whether a border is displayed, and the scrolling type.
9. On the **Dependencies** tab, from the **Available fields** list, select the fields that are required by the Web resource, and then click the **Add Selected Records** button to move the selected fields to the **Dependent fields** list.
10. Click **OK**.
11. When you finish editing the form, click **Save and Close** to close the form.
12. You can preview how the main form will appear and how events will function:

    b. On the **Home** tab, click **Preview**, and then select **Create Form**, **Update Form**, or **Read-Only Form**.

    c. To close the **Preview** form, on the **File** menu, click **Close**.
13. When your customizations are complete, publish them:

- To publish customizations for only the component that you are currently editing, on the **Home** tab, in the **Save** group, click **Publish**.
- To publish customizations for all unpublished components at one time, click **Publish All Customizations**.

Can I do this task?

This task requires the System Administrator or System Customizer security role or equivalent permissions. Customization tasks can be performed only while you are online. More information: *Customization Permissions* (on page 490)

With image Web resources you can add images where you need them. The supported image formats are JPEG, GIF, PNG format, or ICO format.

Common uses include:

- Icons for custom ribbon controls and SiteMap subareas.
- Decorative graphics for entity forms and Web page Web resources.
- Background images used by CSS Web resources.

➢ Add or edit an image Web resource

1. In the Navigation Pane, click **Settings**.
2. Under **Customization**, click **Customizations**.
3. In the **Customization** area, click **Customize the System**.
4. Under **Components**, click **Web Resources**.
5. On the Actions toolbar, click **New**.
6. In the **Name** text box, enter a name for the Web resource. This plus the file extension will become its file name.
7. In the **Display Name** text box, enter a friendly name for this Web resource. This will be displayed in the **Display Name**.
8. In the **Type** drop-down box, select JPG format, GIF format, PNG format, or ICO format.
9. Next to the **Upload File** box, click **Browse**.
10. In the **Choose File to Upload** box, select the file you want, and then click **Open**.
11. When you finish editing the Web resource record, click **Save and Close**.
12. You can preview how the image Web resource will appear:
    a. On the **Web Resource** tab, click **Preview**.
    b. To close the **Preview** form, on the **File** menu, click **Close**.
13. When your customizations are complete, publish them:
    - To publish customizations for only the component that you are currently editing, on the **Home** tab, in the **Save** group, click **Publish**.

- To publish customizations for all unpublished components at one time, click **Publish All Customizations**.

Add or edit a text Web resource

Can I do this task?

This task requires the System Administrator or System Customizer security role or equivalent permissions. Customization tasks can be performed only while you are online. More information: *Customization Permissions* (on page 490)

You can add JScript, HTML, CSS, XML, and XSL text as a Microsoft Dynamics CRM Web resource.

➢ Add or edit a text Web resource

1. In the Navigation Pane, click **Settings**.
2. Under **Customization**, click **Customizations**.
3. In the **Customization** area, click **Customize the System**.
4. Under **Components**, click **Web Resources**.
5. On the Actions toolbar, click **New**.
6. In the **Name** text box, enter a name for the Web resource. This plus the file extension will become its file name.
7. In the **Display Name** text box, enter a friendly name for this Web resource. This will be displayed in the **Display Name**.
8. In the **Type** drop-down box, select Web Page (HTML), Style Sheet (CSS), Script (JScript), Data (XML), or Style Sheet (XSL).
9. Next to the **Upload File** text box, click **Browse**. After you upload the file, its path is listed in the text box.
10. After you have added a text Web resource, a **Text Editor** button appears next to the **Type** drop-down box.
    a. To edit your text or code, click **Text Editor**.
    b. To save your edits and close the text editor window, click **OK**.
11. You can preview how the text Web resource will appear:
    a. On the **Web Resource** tab, click **Preview**.
    b. To close the **Preview** form, on the **File** menu, click **Close**.
12. When you finish editing the Web resource record, click **Save and Close**.
13. When your customizations are complete, publish them:
    - To publish customizations for only the component that you are currently editing, on the **Home** tab, in the **Save** group, click **Publish**.

- To publish customizations for all unpublished components at one time, click **Publish All Customizations**.

Add or edit a Silverlight Web resource

Can I do this task?

This task requires the System Administrator or System Customizer security role or equivalent permissions. Customization tasks can be performed only while you are online. More information: *Customization Permissions* (on page 490)

Add a Silverlight Web resource if you want to include interactivity features to a form in Microsoft Dynamics CRM.

➢ Add or edit a Silverlight Web resource

1. In the Navigation Pane, click **Settings**.
2. Under **Customization**, click **Customizations**.
3. In the **Customization** area, click **Customize the System**.
4. Under **Components**, click **Web Resources**.
5. On the Actions toolbar, click **New**.
6. In the **Name** text box, enter a name for the Web resource. This plus the file extension will become its file name.
7. In the **Display Name** text box, enter a friendly name for this Web resource. This will be displayed in the **Display Name**.
8. In the **Type** drop-down box, select Silverlight (XAP).
9. Next to the **Upload File** box, click **Browse**. After you upload the file, its path is listed in the text box.
10. When you finish editing the Web resource record, click **Save and Close**.
11. When your customizations are complete, publish them:
    - To publish customizations for only the component that you are currently editing, on the **Home** tab, in the **Save** group, click **Publish**.
    - To publish customizations for all unpublished components at one time, click **Publish All Customizations**.

Edit the Site Map

Can I do this task?

This task requires the System Administrator or System Customizer security role or equivalent permissions. Customization tasks can be performed only while you are online. More information: *Customization Permissions* (on page 490)

You can customize the contents of the Navigation Pane in Microsoft Dynamics CRM by editing the Site Map. The Site Map is a part of the customizations.xml document, and you export it as part of an unmanaged solution. The Microsoft Dynamics CRM SDK has reference information for editing the Site Map XML. More information: *Microsoft Dynamics CRM SDK* http://go.microsoft.com/fwlink/?LinkId=191610

➢ Export the Site Map

1. In the Navigation Pane, click **Settings**.
2. Under **Customization**, click **Solutions**.
3. On the Actions toolbar, click **New**.
4. Complete the required fields, and then click **Save**. By default, the solution is saved as an unmanaged solution.
5. To add the Site Map to the solution, click **Add Existing** and select **Site Map**. It is added to the list. More information: *Add new or existing components to an unmanaged solution* (see "*Add new or existing solution components*" on page 504)
6. Click **Save and Close**. Your new unmanaged solution is listed in the **Solutions** list.
7. In the list, select the Site Map solution that you want to export, and then on the toolbar at the top of the page, click **Export Solution**.
8. In the **Export Solution** dialog box, click **Publish All Customizations**.
9. Click **Next**.
10. Select the check boxes for the settings that you want to export with the solution.
11. Click **Next**.
12. On the **Package Type** page, read about your options, and then click either **Unmanaged** or **Managed**.
13. Click the **Export** button.
14. In the **File Download** dialog box, click **Save** and save the file to a location of your choice.
15. Click **Close** to close the **Download Complete** dialog box.

After you modify the XML contents of the Site Map, you import the modified solution that contains the Site Map to apply your changes.

➢ Import the Site Map

1. In the Navigation Pane, click **Settings**.
2. Under **Customization**, click **Solutions**.
3. On the Actions toolbar click the **Import** button.
4. On the **Select Solution Package** page, click **Browse** to locate an XML file or a compressed (.zip) file that contains customizations and settings exported from Microsoft Dynamics CRM.
5. Click **Next**.

After the file is processed, click **View solution package details** to see a list of the solution components that were imported. If any of the items could not be processed successfully, a dialog box will display error messages.

6. If you want to activate any workflows and enable any SDK message processing steps included in the solution, select the **Post Import Actions** check box. The workflows and SDK message processing steps will begin working as soon as the import is finished.
7. Click **Next**.

   When the solution import is done, a message appears notifying you if it was successful. If any of the items could not be processed successfully, the dialog box will display error messages.
8. If you have imported entity customizations you must publish them before they will be available.
   - To publish customizations for only the component that you are currently editing, on the **Home** tab, in the **Save** group, click **Publish**.
   - To publish customizations for all unpublished components at one time, click **Publish All Customizations**.

Edit ribbons

Can I do this task?

This task requires the System Administrator or System Customizer security role or equivalent permissions. Customization tasks can be performed only while you are online. More information: *Customization Permissions* (on page 490)

You can customize the application ribbons in Microsoft Dynamics CRM to define custom actions which, when layered over any existing ribbon definitions, will change the ribbons. Export the ribbons as part of an unmanaged solution and then add XML that defines the changes you want to apply. The Microsoft Dynamics CRM SDK has reference information for editing the ribbon XML. More information: *Microsoft Dynamics CRM SDK* http://go.microsoft.com/fwlink/?LinkId=191610.

View or Download Developer Resources

This page is designed for developers who want to link to the Microsoft Dynamics CRM SDK, developer tools, or want to know the service endpoint URLs.

Organization Unique Name

You need the unique name for your organization when interacting with the Discovery Service.

Windows Azure AppFabric Issuer Certificate

This is the public certificate that is required to configure Windows Azure AppFabric ACS for Microsoft Dynamics CRM integration.

Developer Center

The Microsoft Dynamics CRM Developer Center on MSDN contains a wealth of information to help developers. Here you will find the SDK, which includes documentation, samples, and tools, as well as

technical articles, ramp-up kits, videos, blogs, forums, and more. For more information on using each item on this page, see the article "Using the Developer Resources Page" in the SDK documentation.

Discovery Service

This is a Web service that provides information about the organizations that are available on the Microsoft Dynamics CRM server using the SOAP protocol. This information includes the URL for each organization.

Organization Service

This is a Web service that provides access to the business data and metadata for your organization using the SOAP protocol.

Organization Data Service

An Open Data (OData protocol) Web service that provides access to the business data for your organization using a RESTful API. This link opens the Conceptual Schema Definition Language (CSDL) document, which describes how to access your data using this API.

Managing System Dashboards

Using dashboards

Dashboards in Microsoft Dynamics CRM provide an overview of business data. Act on information that is spread across the organization from one place.

Create dashboard components that help you to dig out and analyze important data.

Types of dashboards

You can create two types of dashboard in Microsoft Dynamics CRM:

- **User dashboards.** An individual user owns a user dashboard. It can be assigned to other users or teams. A user dashboard can be set as the default dashboard for individual users. User dashboards override system dashboards.
- **System dashboards.** A system dashboard is available to all users in the organization. It can be set as a default dashboard for the organization, but could be overridden by a user dashboard. Importing, exporting, or uninstalling a solution applies, the relevant actions on the dashboards.

Dashboards components

Create new dashboards based on the default layouts in the dashboard designer.

- **Charts.** A system (organization-owned) dashboard only contains system charts. A user dashboard can contain system charts and user charts. More information: *Understanding Charts* (on page 140), *Work with Charts ./help/ui_viz_work_with_charts.htm*, Work with System Charts
- **Lists.** A system dashboard only contain lists that use public views to retrieve the data. A user dashboard can contain a list that uses public views and saved views. More information: Create and Configure Views, Work with saved views.
- **IFrames.** A system dashboard restricts or allows cross-frame scripting for an iFrame. A user dashboard restricts cross-frame scripting for all iFrames. More information: Add or edit an IFrame.
- **Web Resources.** Add the HTML, Silverlight (.xap), and images (.jpeg or .jpg, .png, and .gif) Web resources. More information: *Microsoft Dynamics CRM Software Development Kit* http://go.microsoft.com/fwlink/?LinkId=191610.

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Dashboard Permissions

Can I do this task?--System Dashboard

This task requires the System Administrator or System Customizer security role or equivalent permissions. More information about specific permissions and performing this task while offline: Dashboard Permissions

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Dashboard Permissions

1. In the Navigation Pane, click **Workplace**. Then, under **My Work**, click **Dashboards**.
2. In the **Dashboard Management** group, click **New**.

   Dashboard Layouts opens.
3. Select a layout as a starting point to design your dashboard.

Dashboard layouts are comprised of one or more tabs. A tab can be expanded or collapsed. Each tab can contain one or more sections.

Note

All the default layouts, except the **4-Column Overview Dashboard** layout and the **3-Column Overview Dashboard** layout, have a single tab and a single section. You cannot add or delete a tab or a section in a dashboard by using the Dashboard designer. If you want to have multiple tabs or sections in your dashboard, export the dashboard, customize it, and import it back into Microsoft Dynamics CRM. For more information, see Microsoft Dynamics CRM Software Development Kit documentation.

Select one of the six default layouts in order to create your dashboard:

- **3-Column Regular Dashboard**. This has one tab and one section. This layout can accommodate components across three columns.
- **3-Column Multi-Focused Dashboard**. This has one tab and one section. This layout can accommodate components across three columns. Use this layout to draw focus on specific components.
- **4-Column Overview Dashboard**. This has two tabs and two sections. You can expand or collapse each of the tabs in the dashboard. This layout can accommodate components across four columns. In this layout, the section in the bottom row spans across four columns, allowing this column to be used to insert a list of records that has several columns (fields), or to insert a horizontal chart.
- **2-Column Regular Dashboard**. This has one tab and one section. This layout can accommodate components across two columns.
- **3-Column Overview Dashboard**. This has two tabs and two sections. You can expand or collapse each of the tabs in the dashboard. This layout can accommodate components across three columns. In this layout, the column in the bottom row spans across three columns, allowing this column to be used to insert a list of records that has several columns (fields), or to insert a horizontal chart.
- **3-Column Focused Dashboard**. This has one tab and one section. It accommodates components across three columns.

Note

- By default for any layout, you can only add up to six components. This limit can be changed.
- In any layout, you can increase or decrease the height or width of a component only up to a limit:

- You can decrease the width of a component to a minimum of one column.
- You can decrease the height of a component to a minimum of six rows.
- You can increase the width of a component to the number of columns in that layout. For example, if you are using the **3-Column Regular Dashboard**, you can increase the width of a component up to three columns (by two more columns).
- You can increase the height of a component to a maximum of 250 rows.

The right pane shows the appearance of the new dashboard based on the layout selected in the left pane.

1. Click **Create**.

   The dashboard designer opens with empty columns based on your layout selection.
2. In the **Name** box, type a descriptive and useful name for your dashboard.
3. Add different components that you want to be displayed on your dashboard:
   - Chart
4. In the **Insert** group, click **Chart**.

   - OR -

   In an empty component area, click the **Chart** button .
5. In the **Component Designer** dialog box, specify the following information:
   - **Record Type**. Click the record type to use for the chart that you want to add to the dashboard.
   - **View**. Click the view to use for the data in the chart. The **View** drop-down box has the associated views for the chosen record type.
   - **Chart**. Click the type of chart that you want to insert. The **Chart** drop-down box has the associated charts for the chosen record type.

   The chart preview changes based on your choice of the record type, view, and chart.
6. Click **OK**.

   Note

   You can add only system charts in a system dashboard. A user dashboard can contain system charts and user charts.
   - List
7. In the **Insert** group, click **List**.

   - OR -

   In the empty component area, and click the **List** button .
8. In the **Component Designer** dialog box, specify the following information:
   - **Record Type**. Click the record type for the list that you want to add to the dashboard.
   - **View**. Click a view to use for the data for the list. Only views that are associated to the selected record type are in the **View** drop-down box.

9. Click **OK**.

   - IFrame

10. In the **Insert** group, click **IFrame**.

    - OR -

    In the empty component area, click the **IFrame** button .

11. In **Add an IFRAME**, enter the following information:

    - **Name**. Type a unique name for the IFrame. The name can only contain alphanumeric characters and the underscore character.
    - **URL**. Type the full URL for the IFrame. You may select the check box. More information: *Passing Parameters to an IFRAME (Microsoft Dynamics CRM SDK)* (see Passing IFRAME parameters (Microsoft Dynamics CRM SDK) - http://go.microsoft.com/fwlink/?LinkId=201317)
    - **Label**. Specify a label for the IFrame.

      To display this label on the form, select the **Display label on the form** check box.
    - **Visibility**. Select the **Visible by default** check box if you want the IFrame to be visible in the Web application and the Microsoft Dynamics CRM for Outlook reading pane.

    Caution

    Applications can interact with each other through an IFrame. The **Restrict cross-frame scripting** check box is selected by default for security purposes. When the check box is selected, it blocks running scripts in the IFrame.

    More information: Add or edit a form IFRAME.

    Note

    If you are using Microsoft Dynamics CRM 4.0 for Outlook, some URLs added by using an IFrame may show script errors during dashboard loading. These script errors may also obstruct the charts from loading. However in Microsoft Dynamics CRM 2011 for Outlook, you can limit the script errors by selecting the **Restrict cross-frame scripting** check box.

12. Click **OK**.

    - Web resource

13. In the **Insert** group, click **Web Resource**.

    - OR -

    In the empty component area, click the **Web Resource** button .

14. In **Add Web Resource**, specify the following information:

    - **Web Resource**. Click the **Lookup** button , and then in the **Look Up Record** dialog box, select the Web resource that you want to add to the dashboard, and then click **OK**.

    Note

    In a dashboard, you can only add Web resources of the following types: HTML, Silverlight, PNG, GIF, JPEG, ICO.

- **Name**. Type a unique name for the Web resource. The name can only contain alphanumeric characters and the underscore character.
- **Label**. Type a label for the Web resource. To display this label on the form, select the **Display label on the form** check box.
- **Visibility**. Select the **Visible by default** check box if you want the Web resource to be visible in the Web application and the Microsoft Dynamics CRM for Outlook reading pane.
- If you want to provide the target application with information about the context of the Web resource, select the **Pass record object-type code and unique identifier as parameters** check box. More information: *Passing Parameters to an IFRAME (Microsoft Dynamics CRM SDK)* (see Passing IFRAME parameters (Microsoft Dynamics CRM SDK) - http://go.microsoft.com/fwlink/?LinkId=201317).

For more information about adding a Web resource, see Add or edit a form Web resource.

15. Click **OK**.
16. To change the dashboard properties, in the **Action** group, click **Dashboard Properties**. Type the name and description for the dashboard, and then click **OK**.
17. To make changes to a component that you have added to the dashboard designer, select the component, and in the **Action** group, click **Edit Component**. Verify the details or make changes, as required.

    For an IFrame, see information about editing an IFrame.

    For a web resource, see information about editing a web resource.

    For a chart or list component, **Sub-Grid Properties** opens.

    For more information about editing a chart or list component, click:

    - Edit a chart component.

    Verify or change the details, as required:

    a. **Name**. This is the name of the chart.

    c. **Label**. This is what displays on the chart component header.

    d. **Display label on the Dashboard**. Select this check box if you want the label to display on the chart component header.

    e. **Entity**. Click the entity for the chart.

    f. **Default View**. Click the view that will be used to retrieve the data for the chart.

    g. **Display Chart Selection**. Select this check box if you want the option to select different charts from the dashboard.

    - Edit a list component.

    Verify or change the information:

    a. **Name**. Name of the chart.

    h. **Entity**. Entity for which you want to insert a list.

    i. **Default View**. View that is used to retrieve the data in the list.

j. **Display Search Box**. Select this check box if you want a search box to be available with the list. This lets you search for records in the list.

k. **Display Index**. Select this check box if you want the alphabetical index to be available with the list. This lets you jump to records starting with a particular letter or number.

l. **Display View Selection**. Select this check box if you want to be able to select a different view for the list.

18. Click **Save**.

Tips

- While designing the dashboard, you can rearrange the components that you have already added. Click the component header and drag it to an empty area on the dashboard or to the area of an existing component. When you drag a component over other components, a red line appears on top of the components to show that if you drop the component here, the existing component will move down.
- To undo the last action, in the **Action** group, click **Undo**. To repeat an action, in the **Action** group, click **Redo**.
- To change the width of a component, first select the component. In the **Layout** group, click **Increase Width** or **Decrease Width**. When you click **Increase Width** or **Decrease Width**, the width increases or decreases by one column.
- To change the height of a component, first select the component. In the **Layout** group, click **Increase Height** or **Decrease Height**. When you click **Increase Height** or **Decrease Height**, the height increases or decreases by three rows.

Note

- To remove a component from the dashboard designer, in the **Action** group, click **Remove**. When you remove a component, you cannot add a new component in the same place. A new component is added in the bottom area of the designer. You can rearrange the components at any time after you insert it.
- By default, you can add only six components to any dashboard layout. This limit is configurable. For more information, contact your system administrator.

Related Topics

Delete a dashboard

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Dashboard Permissions

Only the user who created a user dashboard or a user with whom the dashboard is shared can delete a dashboard. The user with whom a dashboard is shared can delete it only when assigned Delete privileges at the time of sharing the dashboard.

1. In the Navigation Pane, click **Workplace**. Then, under **My Work**, click **Dashboards**.

2. In the **Dashboards** drop-down box, select the dashboard that you want to delete, and in the **Dashboard Management** group, click **Delete**.
3. In the confirmation message, click **OK**.

Important
If you delete your default dashboard, the next time you navigate to the **Dashboards** area, you will see the default system dashboard.

Related Topics

Use a dashboard

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Dashboard Permissions

Dashboards provide a way to combine data from different areas in a single place. The data is formatted to be easier to understand to provide quick insights. You can use the dashboard components for more in-depth information about the records.

After you design a dashboard, you can you can perform various actions on the dashboard and its components.

Drill down in a chart.

1. In the Navigation Pane, click **Workplace**. Then, under **My Work**, click **Dashboards**.
2. In the **Dashboard** list, click the name of the dashboard that you want to open.
3. Click the category area of the chart in which you want to drill down further to see lower level data.
4. In the shortcut menu, click **Select Field**, and then click the field by which you want to group the category.

   For example, you are viewing a chart that shows opportunities by potential customers. You want to drill down to see the opportunities for one potential customer, grouped by probability. Click the potential customer on the chart, click **Select Field**, and then click **Probability**. The chart now shows the opportunities for this customer with the probability of each opportunity.
5. Click the corresponding icon for a chart type that you want use for viewing the data.
6. Click **OK**.

   You can drill down even further on the resulting chart from the drill down on a chart.

Enlarge a chart.

1. In the Navigation Pane, click **Workplace**. Then, under **My Work**, click **Dashboards**.
2. In the **Dashboard** list, click the name of the dashboard that you want to open.
3. Move the pointer over the chart and pause, and then click the **Enlarge the chart** button .

View the records that are used to generate the chart.

1. In the Navigation Pane, click **Workplace**. Then, under **My Work**, click **Dashboards**.
2. In the **Dashboard** list, click the name of the dashboard that you want to open.
3. Move the pointer over the chart and pause, and click the **View the records that are used to generate the chart** button .

Apply filters on the list.

1. In the Navigation Pane, click **Workplace**. Then, under **My Work**, click **Dashboards**.
2. In the **Dashboard** list, click the name of the dashboard that you want to open.
3. Click the component area that contains the list of records.
4. In the **Current View** group, click **Filter**.

   A **Filter** button is now available for all the columns in the list.
5. On the column on which you want to apply a filter, click the **Filter** button . Then do one of the following:
   - Click one of the default filters for the column.

     - OR -
   - Click **Custom Filter**, choose how to filter the records, and then click **OK**.

Refresh all components in the dashboard.

1. In the Navigation Pane, click **Workplace**. Then, under **My Work**, click **Dashboards**.
2. In the **Dashboard** list, click the name of the dashboard that you want to refresh.
3. In the **Action** group, click **Refresh All**.

Drill down in a chart

1. In the Navigation Pane, click **Workplace**. Then, under **My Work**, click **Dashboards**.
2. In the **Dashboard** list, click the name of the dashboard that you want to open.
3. Click the category area of the chart in which you want to drill down further to see lower level data.
4. In the shortcut menu, click **Select Field**, and then click the field by which you want to group the category.

   For example, you are viewing a chart that shows opportunities by potential customers. You want to drill down to see the opportunities for one potential customer, grouped by probability. Click the potential customer on the chart, click **Select Field**, and then click **Probability**. The chart now shows the opportunities for this customer with the probability of each opportunity.
5. Click the corresponding icon for a chart type that you want use for viewing the data.
6. Click **OK**.

   You can drill down even further on the resulting chart from the drill down on a chart.

Enlarge a chart

1. In the Navigation Pane, click **Workplace**. Then, under **My Work**, click **Dashboards**.

2. In the **Dashboard** list, click the name of the dashboard that you want to open.
3. Move the pointer over the chart and pause, and then click the **Enlarge the chart** button .

View records used for a chart

1. In the Navigation Pane, click **Workplace**. Then, under **My Work**, click **Dashboards**.
2. In the **Dashboard** list, click the name of the dashboard that you want to open.
3. Move the pointer over the chart and pause, and click the **View the records that are used to generate the chart** button .

Apply filter

1. In the Navigation Pane, click **Workplace**. Then, under **My Work**, click **Dashboards**.
2. In the **Dashboard** list, click the name of the dashboard that you want to open.
3. Click the component area that contains the list of records.
4. In the **Current View** group, click **Filter**.

   A **Filter** button is now available for all the columns in the list.
5. On the column on which you want to apply a filter, click the **Filter** button . Then do one of the following:
   - Click one of the default filters for the column.

     - OR -
   - Click **Custom Filter**, choose how to filter the records, and then click **OK**.

Refresh all components

1. In the Navigation Pane, click **Workplace**. Then, under **My Work**, click **Dashboards**.
2. In the **Dashboard** list, click the name of the dashboard that you want to refresh.
3. In the **Action** group, click **Refresh All**.

Make a copy of an existing user or system dashboard

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Dashboard Permissions

To use an existing user dashboard or an existing system dashboard as a base to create another dashboard, make a copy of the existing dashboard. You can save a system dashboard as a user dashboard and assign or share it with users or teams in your organization.

> **Note**
> A system dashboard that contains an IFrame with the **Restrict cross-frame scripting** check box cleared cannot be saved as a user dashboard.

1. In the Navigation Pane, click **Workplace**. Then, under **My Work**, click **Dashboards**.
2. In the **Dashboard** list, select the system or user dashboard that you want to copy as a new dashboard. In the **Dashboard Management** group, click **Save As**.
3. In the **Dashboard Properties** dialog box, type a name and a description for the dashboard, and then click **OK**.

Related Topics

Make a dashboard your default dashboard

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Dashboard Permissions

You can make a dashboard your default dashboard. Then, you will see this dashboard each time you navigate to the **Dashboards** area.

1. In the Navigation Pane, click **Workplace**. Then, under **My Work**, click **Dashboards**.
2. In the **Dashboard** list, select the dashboard that you want to set as the default. Then, in the **Dashboard Management** group, click **Set As Default**.

   When you set a dashboard as your default dashboard, it overrides the default system dashboard that has been set for your organization.

   Important
   If you delete your default dashboard, the next time you navigate to the **Dashboards** area, you will see the default system dashboard.

Related Topics

Share a user dashboard

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Dashboard Permissions

You can share any user dashboard with another user or team in your organization:

1. In the Navigation Pane, click **Workplace**. Then, under **My Work**, click **Dashboards**.
2. In the **Dashboard** list, select the dashboard that you want to share. In the **Action** group, click **Share Dashboard**.

3. In the **Who would you like to share the selected user dashboard with?** dialog box, under **Common Tasks**, click **Add User/Team**.
4. In the **Look Up Records** dialog box, in the **Look for** list, select the type of record you want to find.
5. In the **Search** box, type the first few letters of the name of the record to narrow your search, and then click the **Find** button .
6. In the list of available records, select the check boxes for the users or teams, and then click **Add**.
7. Click **OK**.
8. In the **Who would you like to share the selected user dashboard with?** dialog box, select the type of share access that you want. The available permissions are: Read, Write, Delete, Append, Assign, or Share.
9. Click **OK**.
10. More information: Share a record.

Related Topics

Assign a user dashboard

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Dashboard Permissions

You can assign any user dashboard to other users or teams in your organization.

1. In the Navigation Pane, click **Workplace**. Then, under **My Work**, click **Dashboards**.
2. In the **Dashboards** drop-down box, select the dashboard that you want to assign. In the **Action** group, click **Assign**.
3. On **Assign User Dashboard**, click one of the options:
   - **Assign to me**.

     - OR -
   - **Assign to another user or team**:
     1. Click the **Lookup** button .
     2. In the **Look Up Record** dialog box, in the **Look for** list, click **User** or **Team**.
     3. In the **Search** box, type a part of a user name or a team name, and then, click the **Find** button .
     4. Select the user or team name, and then click **OK**.
4. Click **OK**.

Related Topics

Create a system dashboard

Can I do this task?

This task requires the System Administrator or System Customizer security role or equivalent permissions. More information about specific permissions and performing this task while offline: Dashboard Permissions

1. In the Navigation Pane, click **Settings**.
2. Under **Customization**, click **Customizations**.
3. In the **Customization** area, click **Customize the System**.
4. Under **Components**, click **Dashboards**.
5. On the Actions toolbar, click **New**.

   The **Dashboard Layouts** dialog box opens.
6. Select a layout as a starting point to design your dashboard.

   Dashboard layouts are comprised of one or more tabs. A tab can be expanded or collapsed. Each tab can contain one or more sections.

   Note

   All the default layouts, except the **4-Column Overview Dashboard** layout and the **3-Column Overview Dashboard** layout, have a single tab and a single section. You cannot add or delete a tab or a section in a dashboard by using the Dashboard designer. If you want to have multiple tabs or sections in your dashboard, export the dashboard, customize it, and import it back into Microsoft Dynamics CRM. For more information, see Microsoft Dynamics CRM Software Development Kit documentation.

   Select one of the six default layouts in order to create your dashboard:

   - **3-Column Regular Dashboard**. This has one tab and one section. This layout can accommodate components across three columns.
   - **3-Column Multi-Focused Dashboard**. This has one tab and one section. This layout can accommodate components across three columns. Use this layout to draw focus on specific components.
   - **4-Column Overview Dashboard**. This has two tabs and two sections. You can expand or collapse each of the tabs in the dashboard. This layout can accommodate components across four columns. In this layout, the section in the bottom row spans across four columns, allowing this column to be used to insert a list of records that has several columns (fields), or to insert a horizontal chart.
   - **2-Column Regular Dashboard**. This has one tab and one section. This layout can accommodate components across two columns.

- **3-Column Overview Dashboard**. This has two tabs and two sections. You can expand or collapse each of the tabs in the dashboard. This layout can accommodate components across three columns. In this layout, the column in the bottom row spans across three columns, allowing this column to be used to insert a list of records that has several columns (fields), or to insert a horizontal chart.
- **3-Column Focused Dashboard**. This has one tab and one section. It accommodates components across three columns.

Note

- By default for any layout, you can only add up to six components. This limit can be changed.
- In any layout, you can increase or decrease the height or width of a component only up to a limit:
  - You can decrease the width of a component to a minimum of one column.
  - You can decrease the height of a component to a minimum of six rows.
  - You can increase the width of a component to the number of columns in that layout. For example, if you are using the **3-Column Regular Dashboard**, you can increase the width of a component up to three columns (by two more columns).
  - You can increase the height of a component to a maximum of 250 rows.

The right pane shows the appearance of the new dashboard based on the layout selected in the left pane.

7. Click **Create**.

   The dashboard designer opens with empty columns based on your layout selection.

8. In the **Name** box, type a descriptive and useful name for your dashboard.
9. Add different components that you want to be displayed on your dashboard:

   - Chart

     1. In the **Insert** group, click **Chart**.

        - OR -

        In an empty component area, click the **Chart** button .

     2. In the **Component Designer** dialog box, specify the following information:

        - **Record Type**. Click the record type to use for the chart that you want to add to the dashboard.
        - **View**. Click the view to use for the data in the chart. The **View** drop-down box has the associated views for the chosen record type.
        - **Chart**. Click the type of chart that you want to insert. The **Chart** drop-down box has the associated charts for the chosen record type.

        The chart preview changes based on your choice of the record type, view, and chart.

     3. Click **OK**.

        Note

You can add only system charts in a system dashboard. A user dashboard can contain system charts and user charts.

- List

  1. In the **Insert** group, click **List**.

     - OR -

     In the empty component area, and click the **List** button .

  2. In the **Component Designer** dialog box, specify the following information:

     - **Record Type**. Click the record type for the list that you want to add to the dashboard.
     - **View**. Click a view to use for the data for the list. Only views that are associated to the selected record type are in the **View** drop-down box.

  3. Click **OK**.

- IFrame

  1. In the **Insert** group, click **IFrame**.

     - OR -

     In the empty component area, click the **IFrame** button .

  2. In **Add an IFRAME**, enter the following information:

     - **Name**. Type a unique name for the IFrame. The name can only contain alphanumeric characters and the underscore character.
     - **URL**. Type the full URL for the IFrame. You may select the check box. More information: *Passing Parameters to an IFRAME (Microsoft Dynamics CRM SDK)* (see Passing IFRAME parameters (Microsoft Dynamics CRM SDK) - http://go.microsoft.com/fwlink/?LinkId=201317)
     - **Label**. Specify a label for the IFrame.

       To display this label on the form, select the **Display label on the form** check box.

     - **Visibility**. Select the **Visible by default** check box if you want the IFrame to be visible in the Web application and the Microsoft Dynamics CRM for Outlook reading pane.

     Caution

     Applications can interact with each other through an IFrame. The **Restrict cross-frame scripting** check box is selected by default for security purposes. When the check box is selected, it blocks running scripts in the IFrame.

     More information: Add or edit a form IFRAME.

     Note

     If you are using Microsoft Dynamics CRM 4.0 for Outlook, some URLs added by using an IFrame may show script errors during dashboard loading. These script errors may also obstruct the charts from loading. However in Microsoft Dynamics CRM 2011 for Outlook, you can limit the script errors by selecting the **Restrict cross-frame scripting** check box.

  3. Click **OK**.

- Web resource

  1. In the **Insert** group, click **Web Resource**.

     - OR -

     In the empty component area, click the **Web Resource** button .

  2. In **Add Web Resource**, specify the following information:

     - **Web Resource**. Click the **Lookup** button , and then in the **Look Up Record** dialog box, select the Web resource that you want to add to the dashboard, and then click **OK**.

     Note

     In a dashboard, you can only add Web resources of the following types: HTML, Silverlight, PNG, GIF, JPEG, ICO.

     - **Name**. Type a unique name for the Web resource. The name can only contain alphanumeric characters and the underscore character.
     - **Label**. Type a label for the Web resource. To display this label on the form, select the **Display label on the form** check box.
     - **Visibility**. Select the **Visible by default** check box if you want the Web resource to be visible in the Web application and the Microsoft Dynamics CRM for Outlook reading pane.
     - If you want to provide the target application with information about the context of the Web resource, select the **Pass record object-type code and unique identifier as parameters** check box. More information: *Passing Parameters to an IFRAME (Microsoft Dynamics CRM SDK)* (see Passing IFRAME parameters (Microsoft Dynamics CRM SDK) - http://go.microsoft.com/fwlink/?LinkId=201317).

     For more information about adding a Web resource, see Add or edit a form Web resource.

  3. Click **OK**.

10. To change the dashboard properties, in the **Action** group, click **Dashboard Properties**. Type the name and description for the dashboard, and then click **OK**.
11. To make changes to a component that you have added to the dashboard designer, select the component, and in the **Action** group, click **Edit Component**. Verify the details or make changes, as required.

    For an IFrame, see information about editing an IFrame.

    For a web resource, see information about editing a web resource.

    For a chart or list component, **Sub-Grid Properties** opens.

    For more information about editing a chart or list component, click:

    - Edit a chart component.

      Verify or change the details, as required:

      a. **Name**. This is the name of the chart.

      m. **Label**. This is what displays on the chart component header.

n. **Display label on the Dashboard**. Select this check box if you want the label to display on the chart component header.

o. **Entity**. Click the entity for the chart.

p. **Default View**. Click the view that will be used to retrieve the data for the chart.

q. **Display Chart Selection**. Select this check box if you want the option to select different charts from the dashboard.

- Edit a list component.

  Verify or change the information:

  a. **Name**. Name of the chart.

r. **Entity**. Entity for which you want to insert a list.

s. **Default View**. View that is used to retrieve the data in the list.

t. **Display Search Box**. Select this check box if you want a search box to be available with the list. This lets you search for records in the list.

u. **Display Index**. Select this check box if you want the alphabetical index to be available with the list. This lets you jump to records starting with a particular letter or number.

v. **Display View Selection**. Select this check box if you want to be able to select a different view for the list.

12. Click **Save**.

Tips

- While designing the dashboard, you can rearrange the components that you have already added. Click the component header and drag it to an empty area on the dashboard or to the area of an existing component. When you drag a component over other components, a red line appears on top of the components to show that if you drop the component here, the existing component will move down.
- To undo the last action, in the **Action** group, click **Undo**. To repeat an action, in the **Action** group, click **Redo**.
- To change the width of a component, first select the component. In the **Layout** group, click **Increase Width** or **Decrease Width**. When you click **Increase Width** or **Decrease Width**, the width increases or decreases by one column.
- To change the height of a component, first select the component. In the **Layout** group, click **Increase Height** or **Decrease Height**. When you click **Increase Height** or **Decrease Height**, the height increases or decreases by three rows.

Note

- To remove a component from the dashboard designer, in the **Action** group, click **Remove**. When you remove a component, you cannot add a new component in the same place. A new component is added in the bottom area of the designer. You can rearrange the components at any time after you insert it.
- By default, you can add only six components to any dashboard layout. This limit is configurable. For more information, contact your system administrator.

Edit a dashboard

Can I do this task?

This task requires the System Administrator or System Customizer security role or equivalent permissions. More information about specific permissions and performing this task while offline: Dashboard Permissions

1. In the Navigation Pane, click **Settings**.
2. Under **Customization**, click **Customizations**.
3. In the **Customization** area, click **Customize the System**.
4. Under **Components**, click **Dashboards**.
5. Double-click the dashboard that you want to edit.
6. Add more components to your dashboard:
   - Charts
7. In the **Insert** group, click **Chart**.
8. In the **Component Designer** dialog box, specify the following information:
   - **Record Type**. Click the record type to use for the chart that you want to add to the dashboard.
   - **View**. Click the view to use for the data in the chart. The **View** drop-down box has the associated views for the chosen record type.
   - **Chart**. Click the type of chart that you want to insert. The **Chart** drop-down box has the associated charts for the chosen record type.

   The chart preview changes based on your choice of the record type, view, and chart.
9. Click **OK**.

   Notes
   - The component is added at the end of other components. You can rearrange the components as needed.
   - You can add only system charts in a system dashboard. A user dashboard can contain both system charts and user charts.
   - Lists
10. In the empty component area, and click the **List** button .
11. In the **Component Designer** dialog box, specify the following information:
    - **Record Type**. Click the record type for the list that you want to add to the dashboard.
    - **View**. Click a view to use for the data for the list. Only views that are associated to the selected record type are in the **View** drop-down box.

12. Click **OK**.

    - IFrames

13. In the **Insert** group, click **IFrame**.
14. In **Add an IFRAME**, enter the following information:

    - **Name**. Type a unique name for the IFrame. The name can only contain alphanumeric characters and the underscore character.
    - **URL**. Type the full URL for the IFrame. You may select the check box. More information: *Passing Parameters to an IFRAME (Microsoft Dynamics CRM SDK)* (see Passing IFRAME parameters (Microsoft Dynamics CRM SDK) - http://go.microsoft.com/fwlink/?LinkId=201317)
    - **Label**. Specify a label for the IFrame.

      To display this label on the form, select the **Display label on the form** check box.
    - **Visibility**. Select the **Visible by default** check box if you want the IFrame to be visible in the Web application and the Microsoft Dynamics CRM for Outlook reading pane.

    Caution

    Applications can interact with each other through an IFrame. The **Restrict cross-frame scripting** check box is selected by default for security purposes. When the check box is selected, it blocks running scripts in the IFrame.

    More information: Add or edit a form IFRAME.

    Note

    If you are using Microsoft Dynamics CRM 4.0 for Outlook, some URLs added by using an IFrame may show script errors during dashboard loading. These script errors may also obstruct the charts from loading. However in Microsoft Dynamics CRM 2011 for Outlook, you can limit the script errors by selecting the **Restrict cross-frame scripting** check box.

15. Click **OK**.

    Note

    The component is added at the end of other components. You can rearrange the components as needed.

    - Web resources

16. Click an empty component in which you want to insert a Web resource, and then in the **Insert** group, click **Web Resource**.
17. In **Add Web Resource**, specify the following information:

    - **Web Resource**. Click the **Lookup** button , and then in the **Look Up Record** dialog box, select the Web resource that you want to add to the dashboard, and then click **OK**.

    Note

    In a dashboard, you can only add Web resources of the following types: HTML, Silverlight, PNG, GIF, JPEG, ICO.

    - **Name**. Type a unique name for the Web resource. The name can only contain alphanumeric characters and the underscore character.

- **Label**. Type a label for the Web resource. To display this label on the form, select the **Display label on the form** check box.
- **Visibility**. Select the **Visible by default** check box if you want the Web resource to be visible in the Web application and the Microsoft Dynamics CRM for Outlook reading pane.
- If you want to provide the target application with information about the context of the Web resource, select the **Pass record object-type code and unique identifier as parameters** check box. More information: *Passing Parameters to an IFRAME (Microsoft Dynamics CRM SDK)* (see Passing IFRAME parameters (Microsoft Dynamics CRM SDK) - http://go.microsoft.com/fwlink/?LinkId=201317).

For more information about adding a Web resource, see Add or edit a form Web resource.

18. Click **OK**.

    Note

    The component is added at the end of other components. You can rearrange the components as needed.

19. To change the dashboard properties, in the **Action** group, click **Dashboard Properties**. Type the name and description for the dashboard, and then click **OK**.
20. To make changes to a component that you have added to the dashboard designer, select the component, and in the **Action** group, click **Edit Component**. Verify the details or make changes, as required.

    For an IFrame, see information about editing an IFrame.

    For a web resource, see information about editing a web resource.

    For a chart or list component, **Sub-Grid Properties** opens.

    For more information about editing a chart or list component, click:

    - Edit a chart component.

      Verify or change the details, as required:

      a. **Name**. This is the name of the chart.

      w. **Label**. This is what displays on the chart component header.

      x. **Display label on the Dashboard**. Select this check box if you want the label to display on the chart component header.

      y. **Entity**. Click the entity for the chart.

      z. **Default View**. Click the view that will be used to retrieve the data for the chart.

      aa. **Display Chart Selection**. Select this check box if you want the option to select different charts from the dashboard.

    - Edit a list component.

      Verify or change the information:

      a. **Name**. Name of the chart.

      bb. **Entity**. Entity for which you want to insert a list.

cc. **Default View**. View that is used to retrieve the data in the list.

dd. **Display Search Box**. Select this check box if you want a search box to be available with the list. This lets you search for records in the list.

ee. **Display Index**. Select this check box if you want the alphabetical index to be available with the list. This lets you jump to records starting with a particular letter or number.

ff. **Display View Selection**. Select this check box if you want to be able to select a different view for the list.

21. Click **Save**.

Tips

- While designing the dashboard, you can rearrange the components that you have already added. Click the component header and drag it to an empty area on the dashboard or to the area of an existing component. When you drag a component over other components, a red line appears on top of the components to show that if you drop the component here, the existing component will move down.
- To undo the last action, in the **Action** group, click **Undo**. To repeat an action, in the **Action** group, click **Redo**.
- To change the width of a component, first select the component. In the **Layout** group, click **Increase Width** or **Decrease Width**. When you click **Increase Width** or **Decrease Width**, the width increases or decreases by one column.
- To change the height of a component, first select the component. In the **Layout** group, click **Increase Height** or **Decrease Height**. When you click **Increase Height** or **Decrease Height**, the height increases or decreases by three rows.

Note

- To remove a component from the dashboard designer, in the **Action** group, click **Remove**. When you remove a component, you cannot add a new component in the same place. A new component is added in the bottom area of the designer. You can rearrange the components at any time after you insert it.
- By default, you can add only six components to any dashboard layout. This limit is configurable. For more information, contact your system administrator.

Related Topics

Make a copy of an existing system dashboard

Can I do this task?

This task requires the System Administrator or System Customizer security role or equivalent permissions. More information about specific permissions and performing this task while offline: Dashboard Permissions

To use an existing system dashboard as a base for another dashboard, make a copy of the existing dashboard.

1. In the Navigation Pane, click **Settings**.

2. Under **Customization**, click **Customizations**.
3. In the **Customization** area, click **Customize the System**.
4. Under **Components**, click **Dashboards**.
5. Select the dashboard that you want to copy. On the Actions toolbar, click **Save As**.
6. In the **Dashboard Properties** dialog box, type a name and a description for the copied dashboard, and then click **OK**.

Make a copy of an existing user or system dashboard

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Dashboard Permissions

To use an existing user dashboard or an existing system dashboard as a base to create another dashboard, make a copy of the existing dashboard. You can save a system dashboard as a user dashboard and assign or share it with users or teams in your organization.

Note
A system dashboard that contains an IFrame with the **Restrict cross-frame scripting** check box cleared cannot be saved as a user dashboard.

1. In the Navigation Pane, click **Workplace**. Then, under **My Work**, click **Dashboards**.
2. In the **Dashboard** list, select the system or user dashboard that you want to copy as a new dashboard. In the **Dashboard Management** group, click **Save As**.
3. In the **Dashboard Properties** dialog box, type a name and a description for the dashboard, and then click **OK**.

Related Topics

Make a dashboard the default dashboard for the organization

Can I do this task?

This task requires the System Administrator or System Customizer security role or equivalent permissions. More information about specific permissions and performing this task while offline: Dashboard Permissions

You can make a dashboard the default dashboard. This makes it available to the organization each time users navigate to the Dashboards area.

1. In the Navigation Pane, click **Settings**.
2. Under **Customization**, click **Customizations**.
3. In the **Customization** area, click **Customize the System**.

4. Under **Components**, click **Dashboards**.
5. Select the dashboard that you want to set as the default. On the Actions toolbar, click **Set As Default**.

   Important
   The selected dashboard becomes the default system dashboard. A user in the organization sees the default system dashboard whenever navigating to the Dashboards area unless that user sets a different default dashboard. A user setting a different default dashboard sees a different dashboard in place of the default system dashboard set with this task.

Related Topics

Make a dashboard your default dashboard

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Dashboard Permissions

You can make a dashboard your default dashboard. Then, you will see this dashboard each time you navigate to the **Dashboards** area.

1. In the Navigation Pane, click **Workplace**. Then, under **My Work**, click **Dashboards**.
2. In the **Dashboard** list, select the dashboard that you want to set as the default. Then, in the **Dashboard Management** group, click **Set As Default**.

   When you set a dashboard as your default dashboard, it overrides the default system dashboard that has been set for your organization.

   Important
   If you delete your default dashboard, the next time you navigate to the **Dashboards** area, you will see the default system dashboard.

Related Topics

Manage System Charts

Charts present your organization's data graphically. Data presented in charts can quickly give you insight into large quantities of data that is spread across different areas of your business. This helps you make relevant and timely decisions.

Microsoft Dynamics CRM associates charts with record types. It generates charts using the data in the list of records for any record type. For example, if you create a chart from the list of account records, the Chart Designer shows you only the fields for the Account record type. Multiple charts can be created for a record type. But, you can see only one chart at a time for a record type.

Because charts are created in the context of a list of records, changing the view of a list also changes the chart. Filtering a list of records changes the chart to show the filtered data. Similarly, drilling down in a chart updates the list of records to show the new data.

Creating charts in Microsoft Dynamics CRM

Microsoft Dynamics CRM supports two types of charts.

- **System Charts.** These are available to all users in the organization.
- **User Charts.** These are available to those with whom a chart has been shared or assigned. Sharing can be by users or by teams.

More information: *Work with User Charts ./help/ui_viz_work_with_charts.htm*, Work with System Charts

The Chart Designer in Microsoft Dynamics CRM helps you create the following different form of charts:

- Column
- Bar
- Line
- Pie
- Funnel

To create a chart, specify fields to be displayed on the category and series axes. Typically, the category axis displays data from numeric or non-numeric fields. The series axis displays data from numeric fields.

The Chart Designer supports creating only single-series charts. To create multi-series charts or comparison charts, use Microsoft Dynamics CRM SDK.

To change a chart or create a new chart from another chart, export an existing chart, change the chart's definition file, and then import the changed definition file back to Microsoft Dynamics CRM. More information: *View Data using Charts (Microsoft Dynamics CRM SDK)* http://go.microsoft.com/fwlink/?LinkId=191610.

Can I do this task?

This task requires the System Administrator or System Customizer security role or equivalent permissions. More information about specific permissions and performing this task while offline: Chart Permissions

System charts are organization-owned charts and cannot be assigned or shared.

1. In the Navigation Pane, click **Settings**.
2. Under **Customization**, click **Customizations**.
3. In the **Customization** area, click **Customize the System**.
4. Under **Components**, expand **Entities**.
5. Expand the name of the entity for which you want to create or edit a chart, and then click **Charts**.
6. To create a chart, on the Actions toolbar, click **New**.

   - OR - To edit a chart, click **More Actions**, and then click **Edit**. The **Chart Designer** opens.
7. In **Record Type View**, select a view that you want to use for the chart.

   By default, the default view for any record type is displayed in this list. The view selection determines the data for the chart. For example, if you select My Open Accounts as the **Record Type View**, the chart displays only the data for the open accounts.
8. Format the chart.
9. The purpose of this step is to specify the type of chart, and how the data is displayed in the chart.
10. Specify which data to display on each axis:
    - In **Legend Entries (Series)**, select the field to use for the X axis, and the label that is displayed on the chart for the field.
    - In **Aggregate**, select the option by which you want to group the field you selected in **Legend Entries (Series)**.

    Note

    For numeric fields, you can select any aggregate options. For non-numeric fields, **Count: All** is selected by default and you cannot change it.

    - In **Category**, select the field to use for the Y axis and the label that is displayed on the chart for the field.
    - For fields that are of datetime type, select the option by which you want to group the field you selected in **Category**.

    Based on your **Legend Entries (Series)** and **Horizontal (Category)** selection, the chart is named.
11. In the **Charts** group, click one of the following to set the type of chart to display:
    - **Bar**
    - **Column**
    - **Line**
    - **Pie**
    - **Funnel**

    The **Chart preview** area shows how the data will display.
12. If you want to specify a different name for the chart, click the chart name to edit it.
13. Type a meaningful description for the chart. The description is useful to identify the purpose of the chart.

14. Click **Save**.

    Important
    You can create and attach charts to only those record types in Microsoft Dynamics CRM that support the new ribbon interface in the Web application. This is because all of the chart controls are only present in the ribbon interface of Microsoft Dynamics CRM. For more information, see Charts (Visualizations) for Microsoft Dynamics CRM in the *Microsoft Dynamics CRM Software Development Kit* (see Microsoft Dynamics CRM Software Development Kit - *http://go.microsoft.com/fwlink/?LinkId=97596*).

Delete a system chart

Can I do this task?

This task requires the System Administrator or System Customizer security role or equivalent permissions. More information about specific permissions and performing this task while offline: Chart Permissions

You cannot delete a system chart if the chart is used in a dashboard.

1. In the Navigation Pane, click **Settings**.
2. Under **Customization**, click **Customizations**.
3. In the **Customization** area, click **Customize the System**.
4. Under **Components**, expand **Entities**.
5. Expand the name of the entity that has the chart that you want to delete, and then click **Charts**.
6. In the list of charts, select the chart that you want to delete. Then, on the Actions toolbar, click the **Delete** button .
7. In the **Confirm Deletion** dialog box, click **OK**.

Export a system chart

Can I do this task?

This task requires the System Administrator or System Customizer security role or equivalent permissions. More information about specific permissions and performing this task while offline: Chart Permissions

You cannot create complex visualizations such as multi-series charts or comparison charts by using the Microsoft Dynamics CRM Web application. To create complex charts, export the chart, edit the chart definition file, and then import it back into Microsoft Dynamics CRM.

1. In the Navigation Pane, click **Settings**.
2. Under **Customization**, click **Customizations**.
3. In the **Customization** area, click **Customize the System**.
4. Expand the name of the entity that has the chart that you want to export, and then click **Charts**.

5. Select the chart that you want to export and on the Actions toolbar, click **Actions**, and then click **Export Chart**.
6. To open the exported chart definition file, click **Open**.

   - OR -

   To save the file, click **Save**.

Import system charts

Can I do this task?

This task requires the System Administrator or System Customizer security role or equivalent permissions. More information about specific permissions and performing this task while offline: Chart Permissions

You cannot create complex visualizations such as multi-series charts or comparison charts by using the Microsoft Dynamics CRM Web application. To create complex charts, export the chart, edit the chart definition file, and then import it back into Microsoft Dynamics CRM.

1. In the Navigation Pane, click **Settings**.
2. Under **Customization**, click **Customizations**.
3. In the **Customization** area, click **Customize the System**.
4. Under **Components**, expand **Entities**.
5. Expand the name of the entity to which you want to import the chart, and then click **Charts**.
6. On the Actions toolbar, click **Actions**, and then click **Import Chart**.
7. On the **Import Chart** dialog box, click **Browse** to select the definition file of the chart that you want to import, and then click **OK**.

   Note
   When you import the definition file, Microsoft Dynamics CRM checks the chart definition file for the chart ID, chart name, and the file name in the same order.

   If a chart with the same ID already exists in Microsoft Dynamics CRM, you are given the option either to replace the existing chart with a file or to save the chart that you are importing with a new name. If an ID is not specified in the chart definition file, Microsoft Dynamics CRM checks to see if a chart with the same name already exists. If a chart exists with the same name, you are given the option either to replace the existing chart or to save the chart that you are importing with a new name. If both ID and name are not specified, Microsoft Dynamics CRM checks to see if there is a chart with the name same as the file name. If a chart exists with the same name, you are given the option either to replace the existing chart or to save the chart that you are importing with a new name.

   If there are two or more existing charts with the same name, you can only import a chart with a new name.

Reference

Troubleshooting

Because there are so many details required to map data from a source system to Microsoft Dynamics CRM, migration typically requires several passes before you get all your data to migrate without errors. The basic troubleshooting process is to use test files, and when a record fails to migrate, review the errors, fix them, and then try again.

Preparing a Test Migration

The following topics provide troubleshooting help for specific steps of the data migration process.

- *Troubleshooting Configuring and Starting Data Migration Manager* (on page 639)
- *Troubleshooting Importing a Data Map* (on page 643)
- *Troubleshooting Bulk Deletion* (on page 644)
- *File Errors - Wizard Page* (see "*File Upload Errors*" on page 640)
- Conversion Errors - Wizard Page
- *Data Upload Errors - Wizard Page* (on page 640)
- *Turning on Trace* (on page 641)

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Troubleshooting Configuring and Starting Data Migration Manager

This topic includes information about:

- Requirements for running and starting Data Migration Manager
- More information about configuration wizard pages
- Specific error messages

Requirements for Running and Starting Data Migration Manager

- You must have the Microsoft Dynamics CRM security role to use Data Migration Manager.
- Only the user who installed Data Migration Manager can configure and use it.
- Data Migration Manager can only work with one Microsoft Dynamics CRM server.

  To work around this, if you need to migrate data to another instance of Microsoft Dynamics CRM, you must uninstall and reinstall Data Migration Manager.

  Any data maps that you have created for migrations will be deleted when you uninstall and reinstall. If you need to use an existing data map with the other server, be sure to export the data map prior to uninstalling Data Migration Manager.

- If you choose an existing SQL Server during setup, it must be in the same domain as the computer running Data Migration Manager.
- You must be able to browse to Microsoft Dynamics CRM from this computer to configure and use Data Migration Manager.
- Data Migration Manager is designed for use with Windows default themes. If you are using a different theme and text is not visible, switch to the default theme while you run Data Migration Manager.

More Information About Configuration Wizard Pages

Specify SQL Server Page

If you are using a computer running Microsoft SQL Server rather than Microsoft SQL Server Express, by default the configuration wizard will attempt to connect to the default instance on your server. If you prefer to use a different instance, specify the server name in the format *SQL_server\instance*.

Connect to Microsoft Dynamics CRM Page

Type the same address that you type in the box in Microsoft Internet Explorer when you want to open Microsoft Dynamics CRM.

Specific Error Messages

The request could not be completed because the server is busy. Try again later.

Microsoft Dynamics CRM cannot complete your request because the servers are busy serving requests from users in your organization. If this problem continues, contact Microsoft Dynamics CRM support.

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File Upload Errors

A file upload error can occur if there is an error in any individual ,csv, .xml or .txt file, or if there is an error in one of the files in the .zip file. In either case, Import Data wizard does not allow you to continue until the erroneous file is fixed or is removed from the .zip file being imported.

Common Errors and How to Fix Them

Related Topics

Troubleshooting 639

Data Upload Errors - Wizard Page

The **Data Upload Errors** page is shown only if there are errors uploading the data to the Microsoft Dynamics CRM server. This page displays the first 50 errors found. To view additional errors and additional details for each error, click **Export**.

For a quick overview of which records failed and why, click **Details**.

Choice	Action	Implications
If you want to continue with your import, even though you have some errors:	Click **Export Errors**, and export errors from each entity with failures to a new file so that you can return later to clean up the data, and then click **Next**.	Only records without errors will actually import. This option is useful if you want to save any mappings you have done with the wizard. Since mappings aren't saved until import is completed, it makes sense to complete the import, and then delete all data that was imported. Then you can clean up any errors and repeat the import.
If you're using an existing data map and want to cancel this import and fix errors:	Click **Export Errors**, and export errors from each record type with failures to a new file so that you can return later to clean up the data, and then click **Close**.	Any mappings you have done will be lost.

Common Errors and How to Fix Them

Related Topics

Troubleshooting.....639

Turning on Trace

You can turn on tracing for detailed migration logging. Trace files for large migrations are large, so after you are done troubleshooting, either turn off trace, or remove any unneeded trace log files. After you have done one of these, close or stop Data Migration Manager, Data Migration Manager Hoster, and Async service. Restart these before the next migration.

By default, data migration logging is turned off. Logging functionality is maintained in the following registry entries in the HKEY_LOCAL_MACHINE\SOFTWARE\Microsoft\Data Migration Wizard key.

Key	Default Value	Comments
TraceEnabled	dword:00000000	00000001 turns logging on, 00000000 turns logging off.
TraceDirectory	empty	Path of local directory where log files are created. By default, for Microsoft® Windows Server® 2003 and Windows XP the log files are saved to: C:\Documents and Settings\logon_name\Application Data\Microsoft\MSCRM\Traces For Windows Vista® the log files are saved to: C:\Users\logon_name\Application Data\Microsoft\MSCRM\Traces
TraceCategories	*:Verbose	

Key	Default Value	Comments
TraceSchedule	Daily	
TraceRefresh	dword:00000001	

To turn on trace on the Microsoft Dynamics CRM server, in the registry, in HKEY_LOCAL_MACHINE\SOFTWARE\Microsoft\MSCRM, change the value of TraceEnabled to 1, and the value of TraceRefresh to to a number between 1 and 99. This value is the number of minutes that will pass before the trace settings are reloaded from the registry.

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Related Topics

Troubleshooting 639

Common Error Messages

Troubleshooting information

Errors are found at several stages of the migration process:

- Validating Files.

  File Errors - Wizard Page (see "*File Upload Errors*" on page 640)

- Converting Data.

  Conversion Errors - Wizard Page

- Uploading Data.

  Data Upload Errors - Wizard Page (on page 640)

  Note
  To view the error details later, click **Export Errors**, and save the data to your computer. There is no way to retrieve error information later if you don't use **Export Errors**.

There are several common reasons a record might not migrate:

- A record that does not have an owner who is a valid Microsoft Dynamics CRM user will not migrate.
- There is missing or incorrect data in an attribute used to create a relationship to another record type.
- If an incident record references a contract record of a contract with a **Contract End Date** or **Billing End Date** attribute value less than the current date, the incident record will not be migrated. To work around this, you could change the value in **Contract End Date** and **Billing End Date** during the migration, and after data migration is complete, change the values in Microsoft Dynamics CRM.

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Related Topics

Troubleshooting....639

Conversion Errors - Wizard Page

The **Conversion Errors** page is shown only when errors are found converting the data to Microsoft Dynamics CRM format. This page displays the first 50 errors found. To view additional errors and additional details for each error, click **Export**.

For a quick overview of which records failed and why, click **Details**.

Choice	Action	Implications
If you want to continue with your import, even though you have some errors:	Click **Export Errors**, and export errors from each entity with failures to a new file so that you can return later to clean up the data, and then click **Next**.	Only records without errors will actually import. This option is useful if you want to save any mappings you have done with the wizard. Since mappings aren't saved until import is completed, it makes sense to complete the import, and then delete all data that was imported. Then you can clean up any errors and repeat the import.
If you're using an existing data map, and want to cancel this import and fix errors:	Click **Export Errors**, and export errors from each record type with failures to a new file so that you can return later to clean up the data, and then click **Close**.	Any mappings you have done will be lost.

Common Errors and How to Fix Them

Related Topics

Troubleshooting....639

Troubleshooting Importing a Data Map

Start from a simple data map that only maps the source files to target entities, and then import it. If it works, add attribute mappings a few at a time. Import the data map frequently as you go, so that it is easy to isolate any problems found in the section you just added. Remember to change the name of your data map each time you import it, or delete previous attempts before importing.

When the Import Data Wizard tries to import a data map, it checks first to make sure the schema is valid. All schema errors result in the following error message:

The following mistakes in your file will generate this error message:

- Unclosed XML elements.

  To troubleshoot, open your data map in an XML editor. This will help you see any elements that are not closed properly.

- Element names with errors.

  Compare each element name to the name in the data map schema. Element names are case-sensitive.

  Data Map Schema Reference

- Missing required elements.

  Compare each element to the data map schema. Make sure you include all child elements for each element.

  Data Map Schema Reference

Specific Error Messages

After the schema is validated, specific messages are displayed.

At the time of import, if a map with same name exists, the Import Data Wizard prompts you to save the map with a different name.

If you have a value that is too long in a parameter such as SourceName, Name, or SourceEntityName, you will receive this error. The log file will show a "Generic SQL error." To work around this problem, shorten parameter names in the data map to 160 or fewer characters.

Double-check each target attribute and make sure you are using the name of the attribute, rather than the display name.

The file specifies a list value that does not exist in Microsoft Dynamics CRM.

For mappings in the **PicklistMap** element, list values must be integers, not the strings used in Microsoft Dynamics CRM. The list values must be valid integers: do not enter commas in numbers.

To look up the integer for each list value displayed in Microsoft Dynamics CRM:

1. Go to the **Customization** area of Microsoft Dynamics CRM.
2. Double-click **Customize the System**, double-click the record type, and then click **Attributes**.
3. Double-click the drop-down list attribute.
4. For each list value you are mapping to, select the list value and then click **Edit**.

   The **Value** listed in the **Modify List Value** dialog box is the value you should put in the **TargetValue** element.

Troubleshooting Bulk Deletion

Specific Error Messages

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